

Enterprise Human Resources Information Systems (EHRIS)

User Guide

MyPerformance

(DoD Performance Management and Appraisal Program)

Employee Guide

March 7, 2016

Serving Those Who Serve Our Country

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Introduction

Purpose	The purpose of this guide is to provide employees, step-by-step instructions on how to create a performance plan in MyPerformance.
	MyPerformance helps employees 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.
Who Should Use This Guide?	This user guide is for employees.
Background	
Who to Call For Help?	If you have a question regarding your login, access to other tools within MyBiz+ pages, or system functionality, please contact your Component Help Desk. The Component Help Desk list is located at the bottom of the DCPDS Portal page at <u>https://compo.dcpds.cpms.osd.mil</u> .
Navigation Tips	Use Control and mouse click (Ctrl + Click) on the hyperlinked words to view associated screenshots or move throughout the document. Use the keyboard shortcut alt and left arrow (Alt + left arrow) to go back to where you were.
	If you need to know how to perform a specific task or procedure, use the table of contents herein to locate the information.

How the Guide Is Structured

This guide helps you get started with the tool and serves as a reference whenever you need assistance with a particular function. There are two major sections in this guide:

Performance Management Appraisal Procedures for Employees

• Shows employees how to work in the tool. Work is divided into tasks that are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Performance Management Appraisal Procedures for Rating Officials

• Shows rating officials how to work in the tool. Work is divided into tasks, which are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Transfer, Sharing, and Ownership of Appraisal Records

MyPerformance allows employees and rating officials to transfer performance plans back and forth. Both roles can review the performance plan online, make changes to it, and then transfer the performance plan back. Employees and rating officials can share the performance plan as often as necessary during a single appraisal cycle.

Either the employee or the rating official "owns" the performance plan at any given time. Employees transfer ownership by transferring performance plans to rating officials, and rating officials transfer ownership back to employees in the same way. When the employee has ownership of the performance plan, the rating official may retrieve it in order to complete the plan or make changes.

When the employee owns the performance plan, the rating official:

- Cannot update the performance plan unless the rating official retrieves it.
- Can see all sections of the performance plan. Any changes the employee makes to an in-progress input or overall feedback are not visible to the rating official until the employee transfers the appraisal record again.

When the rating official owns the appraisal record, the employee:

- Cannot update the performance plan.
- Can view the performance plan for information only up to the last sharing point. Any changes the rating official makes to an in-progress performance plan after resuming ownership are not visible to the employee until the rating official transfers the appraisal record again.

Cutting, Copying and Pasting

You can cut or copy and paste from another document. Be aware that special characters may appear incorrectly as you paste your text into the field. You may not see the characters the way they will actually appear (that is, incorrectly) in the system until you save your changes for that page. Take the time to review the text closely after you have saved it, make any changes and save again.

Performance Management Appraisal Procedures –What Employees Need to Know

MyPerformance stores, organizes, and routes information regarding all aspects of the performance management process, including performance plans, progress reviews, and final performance appraisal discussions. This section focuses on the employee's use of the system and explains how to use *MyPerformance* to enter and edit your own performance plan.

At the beginning of the rating cycle (normally April 1 of each year), you or your rating official (usually your immediate supervisor) initiate a new performance plan.

Performance plans include a maximum of ten performance elements and related performance standards. All elements are critical and each performance plan must have at least one element.

There are two approaches to creating a performance plan:

- Your rating official notifies you to create the plan, and you create it.
- Your rating official creates the plan.

You and your rating official should communicate about your performance expectations in creating and finalizing your performance plan. In order to draft your performance plan, you need certain information such as the appraisal period start, end, and effective dates and your relevant organizational mission/strategic goals. If you do not know this information, check with your rating official before you begin.

Getting Started - About DoD Performance Management Appraisal Tool

If you are new to the *MyBiz*+ self-service tool, pages 6 through 11 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 12 and start with 'Creating a Performance Plan (Employee).'

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 <u>https://compo.dcpds.cpms.osd.mil</u> 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 Ask	ed Questions (FAQ)
	ORTAL
News and Infe List updated January 11 13:00 CDT The Department of 5 The Department of 5 the U.S. CENTCOM Civit have to offer are represent The added value for emplorement of the department of Department of the	Smart Card Access Citck the login button below and select your non-email digital certificate. Im Smart Card Login First time Smart Card (CAC) user? <u>Register Hers</u> Returning Non-Smart Card (Non-CAC) User? Click the button below.
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.	Kon-Smart Card Access First time Non-Smart Card (Non-CAC) user? Register Here Password problems? Reset
Component Help Desk Information	For technical problems, select the <u>Contact List</u> for your organization's computer support Help Desk.
For additional information, check out our Erequently Asked Questions (FAQ)	

Figure 1 - DCPDS Portal Login Page - Certificate Selection

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



Figure 2 - Privacy Act Statement

Employee Access to MyPerformance

From the *MyBiz*+ home page, select *MyPerformance* under Key Services.

MyBiz+		Oth	er DCPDS App	lications - ★ Favorites - Customer Support - 📀 I	ielp - Logout
Your Personnel Action for the 2016 Genera	I Pay Adjustment is			Notifications	
available! You can go to the Personal or Po			Read / Unread	Title	Start Date
then select SF50 or NPA Personnel Actions	then select SF50 or NPA Personnel Actions.			A General Pay Adjustment action has been processed on your record NPA Action is processed in DCPDS and is expected to be available in eOPF within the next 48 hours.	10-Jan-2016
		+ 8		W4 Information Review	23-Dec-2015
Welcome,	The information is current as of	19-Jan-2016			
				* You have 1 unread notifications.	
Home					******
* Provide Feedback					Manage My Views
#Key Services	ne Professional Development			Conter Responsibilities/Applications	
Manage Key Services 🗭	Education:	and the state		Responsibilities: READONLY PERSONNELIST	
MyPerformance	Human Resources Management/Personnel Admine Post-Master's - (1999)	stration, Gene	499 (271001)	READONL'I PERSONNELISI	
Request Employment Venification	Training: ADOBE CAPTIVATE 8: BEYOND THE ESSENTIA	S /172-Sep-20	115 - 04-500		
Ovilian Career Report	-2015)	an lan-oath-er	10-94-000		
Update Contact Information	Certification/Licenses:		_		

Figure 3 - *MyBiz*+ Home Page

You are now on the *MyPerformance Main Page* where you can create, update, and view your performance plan/appraisal.

				-	_	_	MyDige 10	E My Baz HOE MY	Performance Login/ I	Mo Dispositi
AyPerformance Main	Page Provide C	uest Feedback My Journal								
mployee										
			M	AyPerfor	rmance Ma	in Page				
									1	Need Help?
		Station of Street			the second second	6	1.00	Sec. 1		Constant of the other
		ning: This application is d						nformation in ?	this	
	syste	m. Unauthorized release o	f classified inform	nation is a vio	lation of law and	may lead to prosecution.				
	the second se	the second state of the second s	the second second second second	Contraction of the		and the second second second	COLUMN AND A	and the second second	A DESCRIPTION OF A DESC	
		and view your Performance Plans of this page.	; view and print part (or an entitie plan	after it is created; and	track the status of a plan. You	can also search t	for completed plan	is by selecting the 'Show	Completed
Nans/Appraisals' link lo	called at the bottom			or an entitive plan	after it is created, and	track the status of a plan. You	can also search	for completied play	is by selecting the 'Show	• Completed
Plans/Appraisats' linik lo	scated at the bottom ce Plan: a Plan Type' i Plan Type	of this page.	onlibed abdaver.	or an entite plan	after it is created; and	track the status of a plan. Yos	can alko search	for completed pla	is by selecting the 'Show	a Completed
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Plans/Appraisals' link to To create a Performanc Select Vchoose Select Appraiso Select the 'Go' I Important: To becom	conted at the bottom ce Plan: a Plan Type' il Plan Type button e familiar with the co	of this page. To complete other actions desc • Select an option from th • Select the 'Go' button kanne, select the 'Reed Help?' Ini	onbed abover. e Action column	or an mitte plan	after it is pessed; and	track the status of a plan. Yos	can also searchi	for completed plan	ns by selecting the Show	a Completed
Plans/Appraisals' link lo To create a Performanc Select 'Choose / Select Appraise Select the 'Ge' !	conted at the bottom ce Plan: a Plan Type' il Plan Type button e familiar with the co	of this page. To complete other actions desc • Select an option from th • Select the 'Go' button kanne, select the 'Reed Help?' Ini	onbed abover. e Action column	or an epitice plan	after it is pessed; and	track the status of a plan. Yos	can also search l		es by selecting the Show	a Completed
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Plans/Appraisals' link to To create a Performanc Select Vchoose Select Appraiso Select the 'Go' I Important: To becom	conted at the bottom de Plan: a Plan Type ¹ I Plan Type Sutton e familiar with the co S Accologics Quebri	of this page. To complete other actions desc - Select an option limit th - Select the 'Go' button' karma, select the 'Need Help?' Ini- col L	rithed above: n Action eakann	or an epitoic plan raisal Year	After it is reacted, and Appraisal 1D	track the status of a plan. You Plan Approval Date	-Chross	Creat		

Figure 4 - *MyPerformance Main Page*

MyPerformance Main Page

The *MyPerformance Main Page* tab is the default page for both employees and rating officials. From this main page you can create, update, view your performance plan/appraisal, and search for completed plans/appraisals. Two additional tabs are available from the main page:

- 1) Provide Guest Feedback tab used if you are identified to provide performance input.
- 2) MyJournal tab is for employees only to keep track of your performance accomplishments.

Provide Guest Feedback

The *Provide Guest Feedback* tab is if you have been invited to provide feedback as a guest participant for employee(s). Your role in the appraisal may be as a guest rater or guest reviewer.

MyPerformance										
MyPerformance Mai	Provide Gue	est Feedback My Journa	1		MyBiz+ ICE My Biz IC	E MyPerformance Log	out Help Diagnostics			
Appraisals as Guest P		Server any source								
1	Appraisances Guest Participant If an employee name is reflected on the table below, it means you have been invited to provide feedback as a guest participant for the employee(s) listed. Your role in the appraisal may be as a guest rater or guest reviewer.									
	and standard o Defense Civ the perform o National Gu appraisal, Ti • Guest Reviewer	d ratings at any stage of the pu vilian Intelligence Personnel Sy ance appraisal. They cannot vi ard (Title 32) can provide feed hey cannot view others' assess can provide overall comments	eformance appraisal. They cann stem (DCIP5) can provide feed ew others' assessments. back and ratings on individual jol iments. at any stage of the performance	n individual performance elements and : ot view others' assessments. back and ratings on individual performar b objectives and provide recommended a appraisal. They cannot view others' as ppraisals as either guest rater or guest n	, nce objectives and performanc job objective ratings at any s ssessments,	e elements at any stage tage of the performance	of			
	Begin by selecting Update	Feedback under the Action co	umn.							
Plans/Appraisals f	or Feedback									
Participation as All		▼								
Records Displayed 10										
Employee Name No results found.	Appraisal Date	Participation Type	Participation Status	Participation Status Date	Date Completed	Rating Official	Type Action			
no results round.										
	My	Performance Main Page Prov	vide Guest Feedback My Journ	al MyBiz+ ICE MyBiz ICE MyPerfor	mance Logout Help Diagn	iostics				

Figure 5- Provide Guest Feedback Page

MyJournal

The *MyJournal* tab is available for employees to track job accomplishments during the appraisal period to assist in developing employee input at the end of the appraisal cycle. Only employees can see their *MyJournal* entries.

MyPerformance	
	ICE MyPerformance Logout Diagnostics
MyPerformance Main Page Provide Guest Feedback My Journal	
My Journal	
	Purge All Save Printable Page
	Need Help?
TIP: The employee journal will assist you in tracking your job accomplishments during the appraisal period. Recording your accomplishments as they occur time you are requested to provide your self-assessment. You will be able to copy and paste information from this tab into other assessment areas. Your jou only be accessible to you.	will assist you at the rnal information will
 As a reminder, you can only paste 8000 characters into the individual job objective assessment area. 	
 Select the "Purge All" button to remove all information contained in your employee journal. 	
Enter job accomplishments here.	*
You have a limit of 8000 characters.	
(Umit to 8000 charaders) Spell Check Counter 43	• Purge All Save Printable Page
MyPerformance Main Page Provide Guest Feedback My Journal MyBiz+ ICE My Biz ICE MyPerformance Logout Diagnostics	

Figure 6 - *MyJournal* Page

💮 м	IyPerforma	nce										
MyPerformance Main	Page Provide Guest	Feedback My Journal							MyBiz+ ICE My Biz ICE MyPe	rformance Logout H	lelp Diagnostics	
Employee												
MyPerformance Main Page												
										Ne	ed 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	a can create, update and vie	w your Performance Plans; view and p	print part or an entire plan afte	er it is created; and track t	he status of a plan. You can also s	earch for comple	ted plans by selecti	ng the 'Show Completed	Plans/Appraisals' link located at t	the bottom of this pag	е.	
To create a Performance	Plan: To con	nplete other actions described above:										
 Select 'Choose a I Select Appraisal P Select the 'Go' but 	Plan Type •	Select an option from the Action colum Select the 'Go' button	in									
Important: To become	familiar with the columns, s	elect the 'Need Help?' link.										
Appraisals of One, E	Employee											
									Create New Pla	an		
									Choose a Plan Type		Go	
Records Displayed 10	•											
Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Туре	Plan Status	Current Status	Action			
One, Employee	Rater, The	Rater, The	2017	53	29-Apr-2016	DoD	Approved	Plan Approved	View	✓ Go		
Select the link to search for												
Show Completed Plans	s/Appraisals											
		М	yPerformance Main Page Pr	rovide Guest Feedback N	My Journal MyBiz+ ICE My Biz	ICE MyPerform	ance Logout Helj	Diagnostics				

Figure 7 - MyPerformance Main Page - Column Area

Table 1 – MyPerformance Main Page - Column Headings and Description

The table below provides a description of each column heading under the Appraisal bar on the *MyPerformance Main Page* screen.

Column Headings	Description
Employee Name	Name
Current Owner	Person who has update capability to the performance plan. The plan may be owned by employee, rating official or higher level reviewer
Rating Official Name	Name of your rating official
Appraisal Year	Performance appraisal cycle year
Appraisal ID	An automated number assigned to a plan when created
Plan Approval Date	Date performance plan was approved
Туре	Identifies the three types of plans that may be created:
	• DoD – DoD Performance Management Appraisal Program (DoD employees will select this option.)
	 DCIPS - Defense Civilian Intelligence Personnel System NG – National Guard (Title 32)
Plan Status	Indicates the status of your performance plan:
	 Approved – Performance plan has been approved and communicated to the employee Modified – An approved performance plan has been changed and the changes have not been approved Pending – Performance plan has been initiated and saved but not approved
Current Status	 Indicates progression through the steps of the performance management process Plan in Progress – Performance plan has been started but not approved or original performance plan was approved and performance elements and standards have been modified but not reapproved Plan Approved – Performance plan has been approved (or modified performance elements and standards have been reapproved) Progress Review in Process – Progress review has been created but not approved Progress Review Completed – Progress review has been approved by rating official and acknowledged by employee Narrative Statement in Progress – Narrative statement has been started but not approved Narrative Statement Completed – Narrative statement has been completed by rating official and acknowledged by employee Annual Appraisal in Progress – Annual Review has been created and transferred to rating official but not approved

Action
Update 🔻
Update
Delete
Transfer to Rating Official
Reports/Forms
Change RO and/or HLR
Track Progress

You are not the current owner of the performance plan/appraisal

Action
View -
View
Retrieve
Reports/Forms
Track Progress

Available actions are determined by ownership and status

- Update Current owner and allows you to update plan/appraisal
- **Delete** You can only delete a pending plan that you created and has not been transferred to the rating official
- Transfer to Rating Official Routes plan/appraisal to rating official
- Reports/Forms To print or save reports and/or forms
- Change RO and/or HLR Change current Rating Official or Higher Level Reviewer for plan/appraisal
- **Track Progress** Displays status of your performance plan throughout the performance cycle
- View Only allows you to view performance plans
- **Retrieve** If the performance plan has not been opened by the rating official, you can retrieve it from rating official

Performance Plans

Creating a Performance Plan (Employee)

Follow these steps to create a performance plan.

1. On the *MyPerformance Main Page*, from the *Create New Plan* drop-down menu, select DoD Performance Management Appraisal Program. (See Figure 8 – *MyPerformance Main Page*) Select the **Go** button to display the *Create Performance Plan* page.

MyPerformance Main Page Provide Guest Feedback My Journal	
Employee	
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 your Performance Plans; view and print part or an entire plan after it is created; and track the status of a plan. You can also search for completed plans by selecting the 'Sho Completed Plans/Appraisals' link located at the bottom of this page.	w
To create a Performance Plan: To complete other actions described above:	
Select 'Choose a Plan Type' Select an option from the Action column Select Appraisal Plan Type Select the 'Go' button	
Important: To become familiar with the columns, select the 'Need Help?' link.	
Appraisals of One, Employee	
Create New Plan -Choose a Plan TypeChoose a Pla	
Records Displayed 10 Defense Civilian Intelligence Personnel System	
Employee Name Current Owner Rating Official Name Appraisal Year Appraisal ID Plan Approval Date Type Plan Status National Guard (Title 32)	
Select the link to search for completed plans. (i) Show Completed Plans/Appraisals	
MyPerformance Main Page Provide Guest Feedback: My Journal MyBiz+ ICE My Biz ICE MyPerformance Logout Help Diagnostics	

Figure 8 - *MyPerformance Main Page*

2. Review the data in Setup Details area identified in Figure 9 below, and make any necessary changes to the default values. The data is auto-populated, but you can override an entry by using the drop-down list or by manually entering data to make changes. The asterisk (*) on the screen indicates that the field is required.

Create Performance Plan	
	Cancel and <u>Return</u> to Main Page
	Need Help?
Employee Information	
Employee Name One, Employee	
Show Employee Details	
Setup Details	
* Indicates required field	
a neroassar heijen ole mone	Build New Plan
* Appraisal Type Annual Appraisal - DoD 🔻	
Sphasal type Annual Appraisal - DDD Section - Provide the Appraisal Period Start Date represents the start of the employee's performance evaluation period under this plan. Please review and change this date, if necessary.	
* Appraisal Period Start Date 01-Apr-2016	
* Appraisal Period End Date 31-Mar-2017	
Appraisal Effective Date 01-Jun-2017	
* Rating Official Name Rater, The 🔄 🔍	
* Higher Level Reviewer Name Reviewer, Higher Level 🔍	
	•
MyBiz+ ICE My Biz ICE MyPerformance FAQ Logout	

Figure 9 - Create Performance Plan

Table 2 – 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

3. Select the **Build New Plan** button to go to the *Plan > Plan Details* page.

Create Performance Plan	Cancel and Return to Main Page
	Need Help?
Employee Information	
Employee Name One, Employee	
Show Employee Details	
Setup Details	
* Indicates required field	
	Build New Plan
* Appraisal Type Annual Appraisal - DoD	
VIP The Appraisal Period Start Date represents the start of the employee's performance evaluation period under this plan. Please review and change this date, if necessary.	
* Appraisal Period Start Date 01-Apr-2016	
* Appraisal Period End Date 31-Mar-2017	
Appraisal Effective Date 01-Jun-2017	
* Rating Official Name Rater, The 🔄 🔍	
* Higher Level Reviewer Name Reviewer, Higher Level 🔍	
MyBiz+ ICE My Biz ICE MyPerformance FAQ Logout	

Figure 10 - Create Performance Plan

4. The *Plan Details* page is displayed in Figure 11 below. On this page you can review the plan details once more and you may make necessary changes if needed. If you need help on this page, select the <u>Need Help?</u> link. The DoD Performance Management 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.

				- Choose an Action	+ Go
Employee Information					
Employee Name EHRIS Accord	agc, Qxetxkoni L		ct appropriate tab for ne in the performance pro		
This screen allows you to view a	id change the details of your performance plan/approx		in the periormance pro		
Step 1: Plan Details					
TIP: Choose an Action – localed at the top right corner – allows for selection of other actions throughout the performance cycle. For additional puldance, select Need Help? * Appraisal Type Annual Appraisal – DoD * Performance (Ren Applovel Dptn			Need Help? provides information on what can be done on each page.		
	·			be done on each page.	
	Annual Appraisal - DoD 🔹	Plan Last Modified Date		be done on each page.	
* Appraisal Type	Annual Appraisal - DoD 🔹 01-Apr-2014 📑	Plan Last Modified Date	Contraction of the second second	be done on each page.	
* Appraisal Type * Appraisal Period Start Dele	Annual Appraisal - DoD • 01-Apr-2014 31-Mar-2015	Plan Last Modified Date	Contraction of the second second	be done on each page.	
For additional guidance, select 1	teen neigr			be done on each page.	

Figure 11 - *Plan > Plan Details* Page

5. The *Mission Goals* page is displayed. Enter your organization's goals so they align your performance elements and standards with your organization's goals and priorities and select the **Save and Continue** button.

		- Choose an Action -	
ployee Information			
ployee Nume EHRIS Aocidage, Qxetxkeni L Stow Employee Details			
s screen allows you to enter your Component organizational values, mission statements, or g	sals which apply to your performance elements and standards.		
p 2: Mission Goals			
Enter your Component's organizational values, mission statement, or goals directly in the			
 Select Save and Continue button at the bottom right corner to move to Step 3: Performant Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Det 			
additional guidance, select Need Help?			
And Andrew Property Party Links (1998)			
DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedicat	ion to duty, integrity, ethics, honor, courage, and loyalty.		
Enter goals here. You have a limit	it of 1400		
characters.			
characters.			
			1
	(manufacture)		
Carrier to 1400 chantemans.	Spell Check Courbon		

Figure 12 - *Plan > Step 2: Mission Goals* Page

6. The *Performance Elements and Standards* page is displayed as depicted below. To add a performance element, select **Add Performance Element** button.

Step 1: Plan Details Step 2: Mission Goals	Step 3: Performance Elements	s and Standards Step	4: Approvals and Acknowledgments		
				Choose an Action	* Go
Employee Information					
Employee Name ENRIS Accolage, Qxetxkonl	í.				
This screen allows you to add or update a perform	ance element and view approved perfo	ormance elements. Perform	ance elements should be written using the SMART	criteria. Select Need more information? link to view th	e SMART criteria.
Step 3: Performance Elements and Standards					
 Select Add Performance Element button to select Update button under the Details Act select Verw button under Details Action co select Delete icon under the Details Details select Delete icon under the Details Details select Save and Continue button at the bott select Save and Go Back button at the bott 	tion column to update a performance e furm to view an approved performance e column to delete an unapproved performance tiom right corner to move to Step 4: Ap	lement that has not been a e element, ormance element, porovals and Acknowledgen			-
For additional guidance, select Need Help?				Add Performance Element	>
	Title	Status	Element Type	Action	Delete
Details Number No vesults found.					

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

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

Add Performance Element and Standard(s)	
* Indicates required field	
	Save Save and Add Another Performance Element 60 Back to Performance Elements
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. 	
 a you see t keum to renormance penens button woods saving, a waning message wa uspay. 	
For additional guidance, select Need Help?	
Performance Element Number 1	
* Performance Element Title PE 1 - Element Title	
* Performance Element Start Date 01-Oct-2015 (example: 18+96-2016)	
Performance Element Status Pending	
Date Last Modified 18-Feb-2016	
* Performance Element Type	
Performance Element and Standard(s)	
Enter performance elements and standard(s) here. You have a limit of 1000 characters.	17
(Limit to 1000 charlastern)	- Spell Check Counter

Figure 14 - Add Performance Element and Standards Page

Table 3 - Performance Element and Standards Fields and Descriptions

The table below provides a description for each of the performance element and standards 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</i> <i>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	Select Critical for each performance element
*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 1000. An employee can have no more than 10 performance elements

Table 4 – Decision Table for Performance Elements

If You	Then
Want to cancel the work that has been created so far	Select the Go Back to Performance Elements button <u>Go Back to Performance Elements</u> 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 Save and Add Another Performance Element
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</i> <i>Standards</i> tab	Select Save button and then select Go Back to Performance Elements button Save Go Back to Performance Elements

The table below provides direction based on the scenario indicated.

8. Select the **Save** button and then the **Go Back to Performance Elements** button when you have completed entering your performance elements. (See Figure 14 on page 16)

Since performance elements have been added, you can update, add, or delete a performance element.

mployee Information				- Chòosé an Action -
impoyee Name EHRIS Accollege H Show Employee Details	Qxebikoli L			
The screen alouis you to add or upo	ate à performance element and veva approved performance der	ents. Performance exments should be written using t	te SHAT otera Seed Need more information?	ink to vew the SMART criteria.
Rep 3: Performance Elements and s	zandarós			11
Select Update button under 0 Select Vew button under De Select Delete icon under the Select Save and Contrive bu	ent button to add a new performance element and standard(s). The Betak Action column to update a performance element that 1 ak Action column to view an approved performance element. Details Delete column to delete as unapproved performance element. Details Delete column to delete as unapproved performance element tion at the bottom right corrier to movie to Step 4: Approval; an on al the bottom right corrier to go back to Step 2: Meson Goa to al the bottom right corrier to go back to Step 2: Meson Goa	ent. 6 Acknowledgements.	a plan you are buil	te a performance element on ding, select the Delete icon e element you want to delete.
				Add Performance Dement
Show Al Details (Ide Al Details Details Number	TRIP	Stabio	Dement Type	Artion Deete
# Show 1 *	Performance Element 1	Pendag	Critical	Update
al Show 2 *	Performance Element 2	Pending	Critical	Update
The success of the second seco				

Figure 15 -*Plan > Step 3: Performance Elements and Standards* Page

9. You can review all the information you have entered on the performance plan before transferring it to your rating official for review.

To view an individual performance element, select **+Show**. To collapse the performance element, select **-Hide**. This function is available throughout the tool. (See Figures 16 and 17 below)

100				Add Performance Element	
Story AL HEAR Hole Al Detail	5				
Details Jumber	Title	Status	Element Type:	Action	Delete
Hide *	Performance Element: 1	Pending	Once	Update	8
Performance Bement 1 The sithe standard for Pe	rformanice Dement 1.				
e shan 1 *	Performance Dement 2	Pending	onsi	Update	1
e Straw	Performance Element 3	Pending	Ottol	Update	.9
				Save and Go	Back Save and Continue

Figure 16 - Plan > Step 3: Performance Element and Standards Page

• To view all details of your performance element, select Show All Details. To collapse, select Hide All Details link.

4				Add Performance Element	
Show Al Details 1836 Al Details Details Number	me	Status	Element Type	Action	Dekte
- 1 mm	Performance Dement 1	Pending	Citcal	Update	8
Performance Element 1 This is the standard for Per	formation Element 1.				
3 MM 7 *	Verformance Element. 1	Pending	Otos	Update	
Performance General 3 This is the same for Perform	Nanot Earmank 2				
- E 1984	Performance Element 3	Percent	(Dittal)	Update	8
Vietomarice Demint 3 Avd Again, this to the same	Information for Performance (Rement 3.				
				Save and Go Back	-

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

10. At this point you have completed your plan and are ready to transfer it to the rating official for review. There is no further action for you at this time on the *Step 4: Approvals and Acknowledgments* tab.

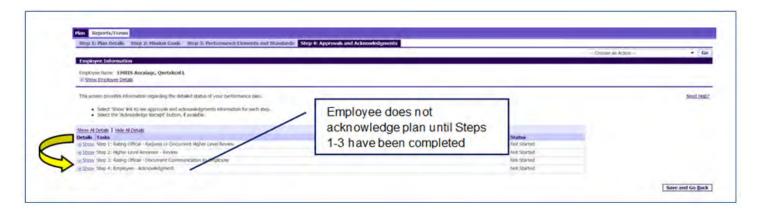


Figure 18 - Plan > Step 4: Approvals and Acknowledgements Page

11. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right. (See Figures 19 and 20 below)

		- Choose an Action -
ngloyee Information		- Choose an Action
nployee Name EHRIS Aooklage, Quetakoni L Store Emskyre: Optaki		Change Rating Official of Higher Level Reviewer Trackier to Danie Official Track Progress Return to Main Page
is screen provides information regarding the detailed status of your performance plan.		Need Her
Select Show Ink to see approvals and acknowledgments information for each step. Select the "Acknowledge Receipt" button, Favailable.		
ni Al Ostale Hde Al Ostale		
talis Tasks	Status	
Stop 1: Rating Official - Request or Document Higher Level Review	Not Started	
Staa, Step 2: Higher Level Reviewer - Review	Not Started	
Step 3: Rabing Official - Document Communication to Employee	Not Started	
Stop 4: Einpkyre - Acknowledgnese	Not-Started	
		Save and Go Bac

Figure 19 - Plan > Step 4: Approvals and Acknowledgements Page

Choose an Action	
Change Rating Official or Higher Level Reviewer	<
Transfer to Rating Official	
Track Progress	
Return to Main Page	
Figure 20 - <i>Plan > Step 4: Approvals a</i>	und Acknowledgements Page - 'Choose an Action' List of Values

12. You have the option to transfer to the rating official with or without e-mail notification. If you chose to enter comments in the **Message to Rating Official** area, your message will show up in the e-mail. Select the **Transfer to Rating Official without E-mail Notification** or **Transfer to Rating Official with E-mail Notification** button to transfer your performance plan to your rating official.

Employee Notification to Rating Official - EHRIS Axwesybisagu, Priamtway U	
Canod	Transfer to Bating Official without E-mail Notification Transfer to Rating Official with E-mail Notification
Message to Rating Official	
This schem allow you to send a message to your Rating official (80) regarding your performance plantagpoalait. The notification can be sent with or without an email message.	
 To provide additional information to the Ro, enter a message to the fact too books Hessage to storag Official and seed. Transfer to Stating Official and facet Tr	at the right correr.
For additional guardience, week! Neted Help?	
Enter message to Rating Official here.	
Spel Check . Note: You are about to contact (PROS Annekybraryu, Prekintwey U by e-mail, Daw to the unerosysted nature of the e-mail communication, plear do not include any non-public it	nformation such as social lecturity maintens or privacy act information in your e-muli.

Figure 21 - Plan> Step 4: Approvals and Acknowledgements>Employee Notification to Rating Official Page

13. You will be returned to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. Your performance plan is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page* as pictured below in Figure 23. You no longer have ownership and can only view your performance plan.

tyPerformance Main Page	Provide Guest Feedback My Journal								
Confirmation The appraisal has been subm Employee	litied to the rating official								
		N	lyPerform	ance Ma	in Page				
									Need Help?
		on is designed for sensitive unclassifi is a violation of law and may lead to		rmation only.	Do NOT enter classif	led information in th	his system. Unau	thorized release	
rom the Main Plage, you can cre	ate, update and view your Performance Plans	s view and print part or an entire plan after it is o	reated; and track the	status of a plan. Y	ou can also search for com	pleted plans by selecting t	the 'Show Conjpleted	Plans/Appraisails' link local	ted at the bottom of the page.
o create a Performance Plan:	To complete other actions des	cribed above:							
Select 'Choose a Plan Typ Select Appraisal Plan Type Select the 'Go' button	 Select the 'Go' button 	Tie Action columni							
portant: To become familar a opraisals of EHRIS Accidan	with the columns, select the 'Need Help?' link. IC, Oxebokcol L								
report answer on a restaur processes								Create New Plan	
								a Plan Type-	
							-Choise	a Han Type-	• 60
							-Cipite	a van Type-	• 60
tecords Daplayed 10 -	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type Plan Status		Action	
Records Displayed 10 • Employee Name HRIS Accilige, Qrebikeri L	Current Owner EPR25 Anviskybickayu, Prinkmbwry U	Rating Official Name EHR25 Awwskytoxayu, Pinámtway U	Appraisal Year 2016	Appraisal ID 74	Plan Approval Date	Type Plan Status DuD Pending			• Go

Figure 22 - MyPerformance Main Page

Editing the Performance Plan (Employee)

After the performance plan has been created by either you or your rating official, it may require edits and further input from either you or your rating official. 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 your rating official
- Creating new performance elements

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

Follow these steps to review and edit your performance plan:

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

										Nec	a.c.upa-
		plication is designed for sensitive unc ation is a violation of law and may lea		information on	ly. Do NOT enter cla	ssified in	formation in	this system. Uni	authorized release		
om the Main Page, you can creat	ife, update and view your Performance	e Plans; view and privit part or an entire plan aft	er it is created; and track	the status of a pla	n. You can also search for i	completed	plans by selection	g the 'Show Complet	ed Plans/Appraisals" link.)	located at the bottom of	of this page.
fo create a Performance Plan:	To complete other actio	ons described above:									
Select 'Choose a Pan Typ Select Appraisal Plan Type Select the 'Go' builton		from the Action column auttain									
mportant: To become familar o	with the columns, select the "Need Help"	7 Inc.									
		7 Inc.									
		7 hs.							Create New P	lan	
		7 kx.						-Cho	Create New Pl		Go
Appraisals of EHRIS Aucolog		7 84.	_					-010			60
Approisals of EHRIS Accolleg accords Displayed 10 •		Rating Official Name	Appraisal Year	Appraisal 1D	Plan Approval Date	Type	Plan Status	-Oros			60
mportants To become familiar o Appendish of EDRIS Accoding Seconds Displayed 10 • Employee Name DRIS Accounts Question L	r, Qaebdaal I.		Appraisal Year 2015	Appraisal ID 74	Plan Approval Date		Pian Status Pendog		sse å Plan Type		5
Appenials of EHRIS Accolog leconts Displayed 10 • imployee Name	r, Qxebokral L Current Owner	Rating Official Name			Plan Approval Date			Current Status	se a Plan Type-		5
Appeniails of EHRIS Accolleg Records Displayed 10 • Employee Name	C Quetokizel L Current Owner EHRS Accurg: Quetokizel L eted plans.	Rating Official Name			Plan Approval Date			Current Status	se a Plan Type-		5

Figure 23 - MyPerformance Main Page

2. The *Plan Details* page is displayed as pictured below in Figure 24. Review the **Plan Details** and, if needed, make required changes. Select the **Save and Continue** button to navigate to the *Mission Goals* tab. If you need to get out of the tool at this time, you should select the **Choose an Action** (list of values (LOV)), select **Return to Main Page**, followed by the **Go** button to go back.

Employee Information Employee Name EHRIS Accidage, Qxetxkonl L If Show Employee Name EHRIS Accidage, Qxetxkonl L If Show Employee Name EHRIS Accidage, Qxetxkonl L If Show Employee Details This screen allows you to view and change the details of your performance plan/appraisal. Step 1: Plan Details Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the necessary changes. Select Swe and Continue button at the bottom right corner – allows for selection of other actions throughout the performance cycle. For additional guidance, select Need Help? Appraisal Period Start Date Appraisal Type Annual Appraisal - DoD Performance Pfan Approval Date Pan Last Modified Date Appraisal Period End Date Apprais	ottep at main petalls Step 2	Mission Goals Step 3: Performance Eleme	ents and Standards Step 4: Approval	s and Acknowledgments		
Employee Name EHRIS Aocidage, Qxetxken L B Show Employee Details This screen allows you to view and change the details of your performance plan/appraisal. Step 1: Plan Details • Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the recessary changes. • Select Size and Continue button at the bottom right carrie to move to Step 2: Mission Goals. The: Choose an Action - located at the top right corner – allows for selection of other actions throughout the performance cycle. For additional guidance, select Meed Help? • Appraisal Type • Appraisal Type • Appraisal Type • Appraisal Flective Dat • Appr					Choose an Action -	+ Go
Brow Employee Details This screen allows you to view and change the details of year performance plan/appraisal. See 1: Plan Details Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the necessary changes. Select Save and Continue button at the bottom right corner - allows for selection of other actions throughout the performance cycle. For additional guidance, select <u>Need Help?</u> Appraisal Period Ratio Date Appraisal Period Ratio Appraisal Period Ratio Appraisal Period Ratio Appraisal Effective Date Appraisal Effective Date Appraisal Effective Date Appraisal Effective Date Appraisal Effective Date Appraisal Effective Date Appraisal Effective Date Appraisa	Employee Information					
Step 1: Plan Details • Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the recessary changes. • Select Sive and Continue button at the bottom right corrier to move to Step 2: Mission Goals. TIP: Choose an Action - located at the top right correr - allows for selection of other actions throughout the performance cycle. For additional guidance, select Need Help? * Appraisal Type * Appraisal Type * Appraisal Period End Date * Appraisal Period End Date * Appraisal Period End Date * Appraisal Effective Date * Appraisal Period Ef		igc, Qxetxkcnl L				
Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the recessary changes. Select Sive and Continue button at the bottom right correct and to move to Step 2: Mission Goals. TIP: Choose an Action - located at the top right correct - allows for selection of other actions throughout the performance cycle. For additional guidance, select Need Help? Appraisal Type Appraisal Type Appraisal Type Appraisal Type Appraisal Period End Date Appraisal Period End Date Appraisal Effective Date Original Approx 2015	This screen allows you to view an	d change the details of your performance plan/app	raisal			
	Step 1: Plan Details					
* Appraisal Type Annual Appraisal - DoD * Performance Plan Approval Date Plan Last Modified Date * Appraisal Period Start Date 01-Apr-2014 Image: Created By * Appraisal Period End Date 31-Mar-2015 Image: Created By * Appraisal Effective Date 01-Jun-2015 Image: Created By				essary changes.		
* Appraisal Type Annual Appraisal - DoD * Performance Plan Approval Date * Appraisal Period Start Date 01-Apr-2014 0 Plan Last Modified Date * Appraisal Period End Date 31-Mar-2015 0 Enclose 01-Jun-2015 0	TIP: Choose an Action - located	at the top right corner - allows for selection of othe	er actions throughout the performance cycle,			
* Appraisal Period Start Date 01-Apr-2014 Plan Last Modified Date Created By EHRIS Aocxlagc, Qxetxkcnl L Created By EHRIS Aocxlagc, Qxe	For additional guidance, select N	eed Help?				
* Appraisal Period Start Date 01-Apr-2014 Created By EHRIS Aocxlagc, Qxebokcnl L * Appraisal Period End Date 31-Mar-2015 * Appraisal Effective Date 01-Jun-2015		The state of the s				
* Appraisal Effective Date 01-Jun-2015		the state of the s		EHRIS Aocxiage, Qxetxkcnl L		
		22.100.24.00				
Higher Level Reviewer EHRIS Auesqzu, Xcnaxdu	Rating Official Name	EHRIS Axwskybxsayu, Pmkmtway U				

Figure 24 - *Plan > Step 1: Plan Details* Page

3. The *Mission Goals* page is displayed as pictured below in Figure 25. Review the **Mission Goals** and, if needed, make required changes. Select the **Save and Continue** button to navigate to *Performance Elements and Standards* tab. If you need to go to the *Plan Details* tab, use the **Save and Go Back** button.

Keports/Forms Step 1: Plan Details Step 2: Mission Gools Step 3: Performance Elements and Standards - Step 4: Approvals and Acknowledge	awiedgments				
Employee Information				Choose an Action	- Go
Employee Name EHRIS Accilage, Qxebokoni L Brokove Name EHRIS Accilage, Qxebokoni L B ShoreEmployee Details					
This screen allows you to enter your Component organizational values, masion statements, or goals which apply to your performance eleme	ents and standardr	6			
Step 2: Headen Goale Enter your Component's organizational values, mesion statement, or goals directly in the text box or copy and paste from another e Select Save and Controve button at the bottom right comer to move to Step 3: Performance Elements and Standards. Select Save and Go Back button at the bottom right comer to go back to Step 1: Plan Details. For additional guidance, seet: Need Netb2	document.				
DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duly, integrity, ethics, honor, courage	ie, and loyalty.				
Enter your Component's organizational values, meson statement, or goals directly in the text box or copy and paste from another doo Select Save and Continue button at the bottom right corner to move to Step 3: Performance liements and Standards	siment				
Let to 149 desched	-	Spell Check	Counter 233		-
				Save and Go Back	Save and Continue

Figure 25 - Plan > Step 2: Mission Goals Page

4. The *Performance Elements and Standards* page is displayed. If you need to add a performance element, select the **Add Performance Element** button. You can also update your information by selecting the **Update** button.

npkyre hane EHBETS Accollege Q Shoe Empkyre: Defaile	rebókoví L				
is screen allows you to add or update	a performance element and view approved performance element	erts. Performance elements should be written using t	be SMART criticia. Select Need more information? Init to	vew the SMART citeria.	
ep 3: Performance Elements and Stain	dands				
Select Vew button under Details Select Delete kon under the Det Select Seve and Continue buttor	betals Action column to space a performance ensure that in Action column to see an approved performance ensures. Als obtain column to adates an asagenovad performance ensures at the bothom right comer to go back to Step J: Mason Goals at the bothom right comer to go back to Step J: Mason Goals fact	ant. I Acknowedgements.		Add Performance Lienced	\$
stalls Humber	The	Status	Element Type	Action	Delete
201 1	Performance Element (Proding	Disca	Opdate	8
	Performance Dement 2	Pending	Ottol	Update	9
Show 7 *		Pending	Deal	Upstate	
Ston 2 • Ston 3 •	Performance Rement 3	11100			-

Figure 26 - Plan > Step 3: Performance Elements and Standards Page

5. The *Add Performance Element and Standard(s)* page is displayed. The asterisk (*) on the screen indicates that 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** and the **Go Back to Performance Elements** buttons.

Add Performance Element and Standard(s)	
* Indicates required field	
	Save Save and Add Another Performance Element Go Back to Performance Elements
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 Help2	
Performance Element Number 1	
* Performance Element Tible PE 1 - Element Tible	
* Performance Element Start Date 01-Oct-2015 (example: 18 Feb-2016)	
Performance Element Status Pending	
Date Last Modified 18-Feb-2016	
* Performance Element Type Ortical 🝷	
Performance Element and Standard(s)	
This information is based on the performance element identified in PE 1.	2
(Limit to 1000 characters)	Spell Check Counter 72
dimust to 1996 curai acreatity	Spell Check Counter 72

Figure 27 - Add Performance Element and Standard(s) Page

6. If you need to update an existing performance element, select the **Update** button under the **Action** column. **NOTE**: Once the performance plan is approved, you, the employee, cannot delete a performance standard and element.

mployne Information				- Choose an Action -	
ngkyen kane (HRUS Accollege, Q I Ston Empkyen Detall	antoixeni (
his scriwin allows you to add or update	a performance aliment and very approved performance internet	c. Perturnana vieweta (hout be vetter using t	the SPART colores. Seed: Need more information? in	A TO VIEW DIE SHART Aramia.	
tep it: Performance Elements and Sca	startly		The state of the	10.0 2 2 2 2 3 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
Solect Update Sutton under the Solect View Sutton under Detail Solect Delifie Kon under the Det Solect Solect Sole and Continue butto	Lottain be also a rew performance denses i and mendarition. Dealik Action column to lupidate à performance riennet Rivat has Action column to view an apprivad performance dense. Als Diete column to deate au unapprevent performance denses al the bottom column to deate au unapprevent performance denses at the bottom right convex to go black to thep 2; Mason Guian at the bottom right convex to go black to thep 2; Mason Guian.		a plan you are build	te a performance element on ding, select the Delete icon e element you want to delete.	
a allstavidgudanov, selict <u>Neral I</u>	der.			Add Performance Liement	2
how ALDetails Hole ALDetails letails: Number	me	Status	Liement Type	Action	Deter
officer 1 ·	Performance Demont, L	Pending	Otor	Update	Û
ation 2 ·	Performance General 2	Tending	Critical	Update	
	Performance Element 1			Undate	9

Figure 28 - Plan > Step 3: Performance Elements and Standards Page

7. Review performance elements, and, if needed, make required changes.

Update Performance Element and Standard(s)		
* Indicates required field		Save Return to Performance Liements
This screen allows you to update your performance amment and standard(s).		Save Borna to restormance Demence
 Enter your performance element and standard(i) in the text biol or copy and pasts from another document; Select Save button at top right corner to periodically save your work. 		
 Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards. 		
If you seect Return to Performance Elements button without saving, a warring message will display.		
För additional guidance, select. Meed.Help2		
Performance Cement Number 1		
* Performance (lement 12) Performance (lement 1		
* Performance Element Start Date 01-Nov-2015		
(example: 21-ber-303)		
Performance Derivert Status - Pending		
Date Last Nodfed 05-Feb-2016		
* Performance Dement Type Critical •		
Performance Element and Standard(S)		
The sithe standard for Performance Element 1.	-	
	and the second se	
Dest to 1000 characteries	Spel Check Counter +1	

Figure 29 - Update Performance Element and Standard(s) Page

Table 5 – Decision Table for use when editing Performance Elements and Standards

Complete the page using one of the following options:

If You	Then
Want to cancel the changes to an existing performance element	Select the Go Back to Performance Elements button <u>Go Back to Performance Elements</u> You will receive a warning message asking if you want to save the changes. Select the No button
Want to save the changes you made to the existing performance element and update another performance element	Select the Save button and then select Go Back to Performance Elements button Save Go Back to Performance Elements
Want to save your updates periodically on the same page	Select the Save button
Finished updating performance elements and want to return to the <i>Performance Elements and</i> <i>Standards</i> tab	Select the Save button and then select Go Back to Performance Elements buttonSaveGo Back to Performance Elements

8. At this point you have made all of the changes for your plan and are ready to transfer it to the rating official for review. There is no action for you, the employee, on the *Approvals and Acknowledgments* tab.

Han Experts/Form Big 11 Hat Debils: Step 2 Hamilt Gale: Step 2. Sectorelation Demonstrated Homologies, Merg	• Approvals and Arthoenelisdgements		- Chine as Action - 🖌 🖌
Employee Information Unployee home. EP(61S Chatmann, JajovA			
V See Limited Diffet The screen provides effectively regarding the delates of year performance plane Select The form is to management and advance plane relations for each max. Select The delates for each maximum formation for each max. Select The delates format format formation Provide The delates Provide The	Employee does not acknowledge plan until Steps 1-3 have been completed by the rating official/higher level reviewer.	Marin Corporal Corporal Set Stand Set Stand	345.95
			tin Ba

Figure 30 - Plan > Step 4: Approvals and Acknowledgements Page

9. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right.

Step 1: Has Details Step 2: Mission Gools Step 3: Performance (Sometic and Standards Mep 4: Approvals and Acknowledgewests		- Ones an Adam - 🖓 🖌
Englisyon Information		Constantion 2
Employer Name ENHES Clinitenani, Jajovili 9 Shan Employer Datalo		
The assess provides information regarding the studie of your performance per-		Send 198
Maked "Show" line to law approach and approximation information for anoth deep Maked the Incommission former, if available		
Max Al Januar Halk Al Jahara		
Dottalls Fanks	Matur	
2 Zipan (Herp 1) Rating Official - Regional of Decomment Higher Level Revenue	Cirighted	
# 200a Shiti 2: Higher (and Rocanet - Monte	tonpleted	
Stand Bing Dr. Anting Official - Document Communication to Employment	April Starbed	
a Schurzbag & Employees - Advantational general	Art Kurhd	

Figure 31 - Plan > Step 4: Approvals and Acknowledgements Page



Figure 32 - Plan > Step 4: Approvals and Acknowledgements Page - 'Choose an Action' List of Values

10. You have the option to transfer to the rating official with or without e-mail notification. If you choose to enter comments in the **Message to Rating Official** area, your message will show up in the e-mail. Select the **Transfer to Rating Official without E-mail Notification** or **Transfer to Rating Official with E-mail Notification** button to transfer your performance plan to your rating official.

Hoyee Hotilication to Rating Official - EHRIS Anwekyboxsayu, Prinkmitway U			
	Cancel Transl	in to gating Official without E-mail Notification	Transfer to Rating Official with E-mail Notification
ewage to Rating Official		~ ~	
a screen allow you to send a message to your fixing Official (RD) reparting your performance play/appraise. The intelligition can be set with or without an	end cesage.		
 To provide Additional Information to the IRO, enter a message in the text tow below Resulting to Result of Result of Result Transfer to Roting Official and flue 3 Pyou choice not to used a message, select Transfer to Stateg Official address (E-mail Kristinanis tuttors: true will exist to contract the RO denotity, Seed: C-and tottom at the nyite come to spoke to the provision terms without analyzing my change. 	thy by 8-mail buttow at top rep	E CONWE.	
addtonargustavor, select Hend Belgiz			
Enter message to Rating Official here.			
	Spel Check		
Row Too law also it to contact EMES Assekubations. Trainitions if the e-mail, Due to the unrecepted native of this e-mail communication, piece do not its	3x04 kmy inon-public information	wild as local security numbers or privacy ad infor	matters in your e-mail.

Figure 33 - Plan > Approvals and Acknowledgements > Employee Notification to Rating Official Page

11. You will be navigated to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. You no longer have ownership and can only view your performance plan.

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			MyPerform	ance Ma	in Page					
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Figure 34 - MyPerformance Main Page with Confirmation

Acknowledging the Performance Plan (Employee)

After your rating official has finalized your performance plan and, if necessary, the performance plan has been approved by the higher level reviewer, he or she transfers the plan to you. The employee and the rating official should communicate about the final plan, then acknowledge the performance plan has been communicated to you.

Acknowledging the performance plan was communicated to you does not mean you agree with it; you are merely acknowledging it was communicated to you by your rating official. You are encouraged to engage in two-way communication with your rating official, if necessary, before you reach the acknowledgement stage to try to resolve any disagreements and determine performance elements and standards that are mutually understood by both you and your rating official.

The performance plan must be approved within 30 days from the start of the rating cycle, entrance on duty, or job change, unless an extension is granted.

As described earlier, the typical steps in the performance plan process are as follows. The step covered in this section is 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 you and your rating official before the plan is finalized.
 - The performance plan is approved by the higher level reviewer or the rating official documents the higher level reviewer approval.
- 3. The rating official documents communication to employee and transfers the plan so the employee can document acknowledgment.
- 4. The employee reviews the performance plan and acknowledges that it was communicated to him or her by the rating official.

Follow the below steps to acknowledge communication of your performance plan.

1. When Steps 1 and 2 of the *Plan Approvals and Acknowledgments* (see Figure 35 below) have been completed, you will receive an email message stating that your plan has been approved. (See Figure 36)

Plan Reports/Forms		
Step 1: Plan Deballs Step 2: Menian Lionis: Step 2: Performance Dements and Standards Step 4: Approvals and Acknowledgee	N/s	
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Figure 35 - Step 4 Approvals and Acknowledgement Tab

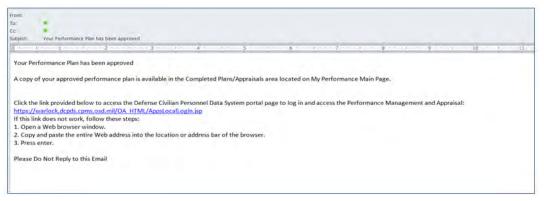


Figure 36 - Email to Employee – Plan Approved

2. When the rating official completes Step 3 on the *Approvals and Acknowledgments* tab and the rating official selects **Transfer to Employee with E-mail Notification**, the employee will receive an email message. The email will communicate where you need to proceed in the performance plan/appraisal process.

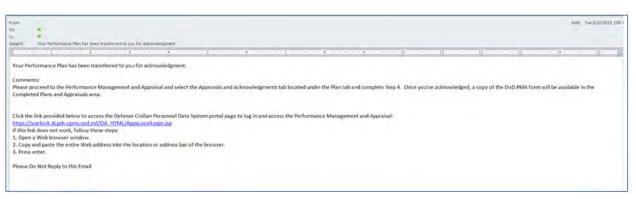


Figure 37 - Email to Employee - Next Steps

3. Select the performance plan that needs to be acknowledged from *MyPerformance Main Page*.

	de Guest Fredback	My Journal							
mployee				Au Dorform	ance Main Pa				
				yperform	ance Main Pa	ge			
									Need Help?
		This application is designed for s formation is a violation of law ar			tion only. Do NOT enter o	Jasaified information	in this system, Unaut	horized release of	
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	To complete a	ther actions described above:							
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Figure 38 - MyPerformance Main Page - Pending Acknowledgement

4. You can review the performance plan details, mission goals and performance elements and standards before navigating to *Approvals and Acknowledgments* tab to acknowledge your plan. NOTE: Once the plan has been approved *Progress Reviews, Annual Appraisal, and Narrative Statements* tabs become available.

Descence Deviews Annual Annual	Namatius Statements			MyBiz+	FAQ Logout
an Progress Reviews Annual Appraisal Step 1: Plan Details Step 2: Mission Goals		nents and Standards Step 4: Approvals a	nd Acknowledgments		
				Choose an Action	• Go
Employee Information					
Employee Name EHRIS Aocxiagc, Qxetxkcnl Show Employee Details	L				
This screen allows you to view and change the de	tails of your performance plan/a	appraisal.			
Step 1: Plan Details					
Select Save and Continue button at the bo	ottom right corner to move to s				
TIP: Choose an Action – located at the top right. For additional guidance, select <u>Need Help?</u>	corner – allows for selection of o	other actions throughout the performance cycle			
* Appraisal Type Annual Appr * Appraisal Period Start Date 01-Nov-201		Performance Plan Approval Date Plan Last Modified Date	29-Feb-2016		
* Appraisal Period End Date 31-Oct-2016		Created By	EHRIS Aooxiagc, Qxebxkcni I.		
* Appraisal Effective Date 01-Jan-2017					
Rating Official Name EHRIS Axwsk Higher Level Reviewer EHRIS Auesq					
					Save and Continue

Figure 39 - Plan tab - Identifying Additional Tab Availability

5. Step 4 – *Details / Tasks* shows pending employee acknowledgment and the **Acknowledge Receipt** is available for selection. Select **Acknowledge Receipt** button.

			MyBi2+	FAQ Logout
an Progress Reviews Annual Appraisal Narrative Statements Reports/Forms				
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standard	Step 4: Approvals and Acknowledgments			
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Figure 40 - Plan>Step 4 Approvals and Acknowledgements tab

6. When you select **Acknowledge Receipt** a **Date box** is available. You can manually enter the date or use the calendar icon. Enter the date you are acknowledging and select the **Save** button.

			mj tear	rwy Lugodi
Plan Progress Reviews Annual Appraisal Narrative Statements Reports/Forms	and the second se			
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards	Step 4: Approvals and Acknowledgments			
the second s			- Choose an Action	• GO
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Details Tasks	Status	Action		
Strom Step 1: Rating Official - Request or Document Higher Level Review	Complexed	Step 1 completeu		
Story Step 2: Higher Level Reviewer - Review	Completed	Step 2 completed		
Show Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed		
HBB Step 4: Employee - Acknowledgment	Pending Empl Acknowledgment	Acknowledge Receipt		
Date 25Feb-2016		Cancel	Save	
				Save and Go Back
About this Page Privacy Statement	MYBRE FAQ Logout			

Figure 41 - Plan>Step 4 Approvals and Acknowledgements tab

7. Step 4 of the *Details / Tasks* is completed. You have just successfully acknowledged receipt of your performance plan.

Plan Progress Reviews Annual Appraisal Narrative Statements Reports/Forms		4922	H FAU LOGOU
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments			
		Choose an Action	✓ Go
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Show AI Details Hide AI Details Details Tasks	Status		
Step 1: Rating Official - Request or Document Higher Level Review	Completed		
🕞 Shon Step 2: Higher Level Reviewer - Review	Completed		
Show Step 3: Rating Official - Document Communication to Employee	Completed		
E Show Step 4: Employee - Acknowledgment	Completed		
			Save and Go Back
MyBiz+ FAQ Logicut	-		
About this Page Privacy Statement			

Figure 42 - Plan>Step 4 Approvals and Acknowledgement tab

Completed Plans/Appraisals Section

The Completed Plans/Appraisals section allows you to search for and see your past completed plans/appraisals.

Appraisals of Or	ne, Employee									
									Create New Pla	an
								Choose a Plan Typ	e	Go
Records Displayed	10 🔻									
Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal II) Plan Approva	Date Typ	e Plan Status	Current Status	Action	
One, Employee	Rater, The	Rater, The	2017	53	29-Apr-2016	DoD	Approved	Plan Approved	View	▼ Go
	1.6									
Select the link to sea Hide Completed P	rch for completed plan lans/Appraisals	15,								
Completed Plan										
 Begin with entering Select the Find b 	ng search criteria. The utton, Your results wi	e following fields can be ente Il be based on your search c	red in any combinat riteria. If there is no	search criteria ent	rear only or b) Appr ered, your results wi	isal Year and B I be all Comple	vent. ted Plans/Appra	isals.		
			Appraisal Year	T						
			Event			•				
				Find Clea	ar					
	10									
Records Displayed	10 🔻	Appraisal ID	T	ype Eve	nt Event	Completion I	late			Reports/Forms
No search conducted		Phylaisal 10		ype Lve	Lvent	completion	/010			Reports/Forms

Figure 43 - MyPerformance Main Page - Completed Plans and Appraisals Section

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