

MyPerformance

(DoD Performance Management and
Appraisal Program)

Rating Officials User Guide
(Supervisors and Managers)

March 7, 2016

Table of Contents

Table of Contents	2
Getting Started - About DoD Performance Management Appraisal Tool.....	3
Accessing the DoD Performance Management Appraisal Tool	3
DCPDS Portal	4
Rating Officials (Managers and Supervisors) Accessing MyPerformance.....	5
Table 1 – <i>Create Performance Plan</i> page - Setup Details fields and descriptions	9
Table 2 - Performance Element and Standards Fields and Descriptions	12
Table 3 – Decision Table for Performance Elements	13
Performance Plan: Editing the Plan (Rating Official)	18
Table 4 – Decision Table for use when editing Performance Elements and Standards.....	23
Performance Plan: Approving the Plan (Rating Official).....	24
Table 5: Plan Approval Steps.....	25
Table 6 – Documenting the Higher Level Reviewer Process	30
Table 7 – Documenting communication with the employee	31
Table 8 – Documenting the employee’s acknowledgement	35

Getting Started - About DoD Performance Management Appraisal Tool

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

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

Accessing the DoD Performance Management Appraisal Tool

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

DCPDS Portal

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

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



Figure 1 - DCPDS Portal Login Page - Certificate Selection

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



Figure 2 - Privacy Act Statement

Rating Officials (Managers and Supervisors) Accessing MyPerformance

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

The screenshot shows the MyBiz+ home page interface. At the top, there are navigation links for 'Other DCPDS Applications', 'Favorites', 'Customer Support', 'Help', and 'Logout'. A notification banner on the left states: 'Your Personnel Action for the 2016 General Pay Adjustment is available! You can go to the Personal or Position Detail tile and then select SF50 or NPA Personnel Actions.' Below this is a 'Welcome, The Rater' message. The main content area is divided into three sections: 'Key Services', 'Last Personnel Action', and 'Professional Development'. In the 'Key Services' section, the 'Manager Functions' link is highlighted with a red rectangular box, and the sub-link 'Performance Management and Appraisal' is visible below it. The 'Last Personnel Action' section shows details for a 'Name Change from ARM Hgazzh,Upybozugs D' effective on 10-Jul-2015. The 'Professional Development' section lists education and training records.

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

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

The screenshot displays the MyPerformance Main Page. At the top, there is a 'Warning' message: '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.' Below the warning, there are instructions on how to create and manage performance plans. A section titled 'Plans/Appraisals in Progress' includes a 'Create New Plan' button and a dropdown menu to 'Choose a Plan Type'. At the bottom, there is a table with the following columns: Employee Name, Current Owner, Rating Official Name, Appraisal Year, Appraisal ID, Plan Approval Date, Type, Plan Status, Current Status, and Action. The table currently shows 'No results found.' There is also a link to 'Show Completed Plans/Appraisals'.

Figure 4 - MyPerformance Main Page

Performance Management Appraisal Procedures for Rating Officials

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

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

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

There are two approaches to creating a performance plan:

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

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

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

Performance Plan: Creating the Employee Plan (Rating Official)

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

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

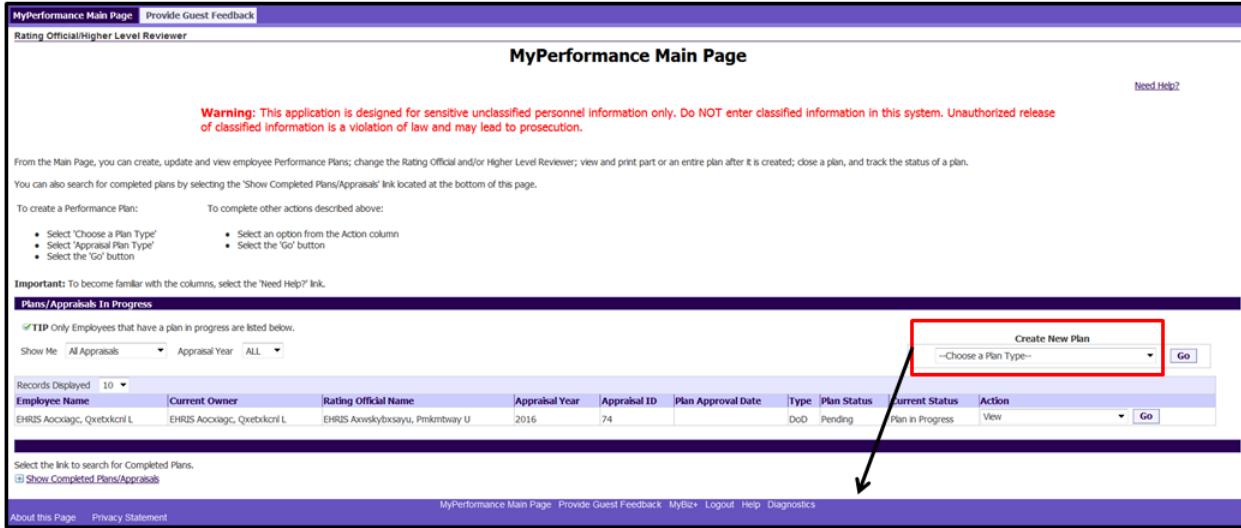


Figure 5 - MyPerformance Main Page

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



Figure 6 - Create New Plan List of Values

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

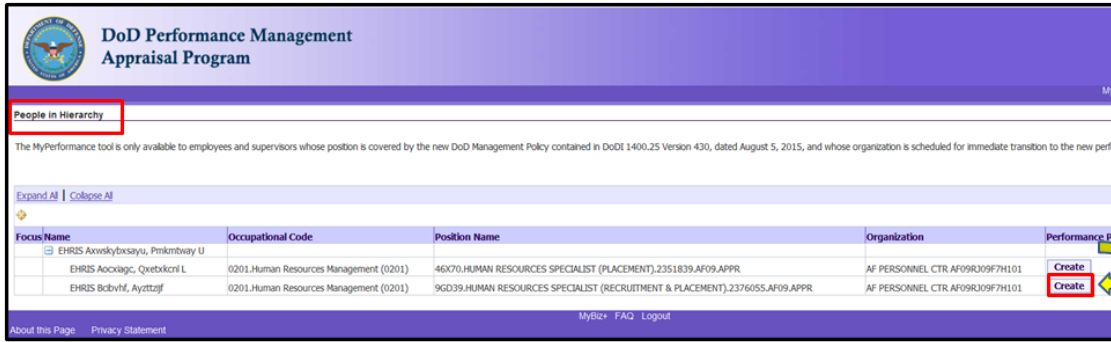


Figure 7 - People in Hierarchy Page

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



Figure 8 - Acknowledgement Page

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

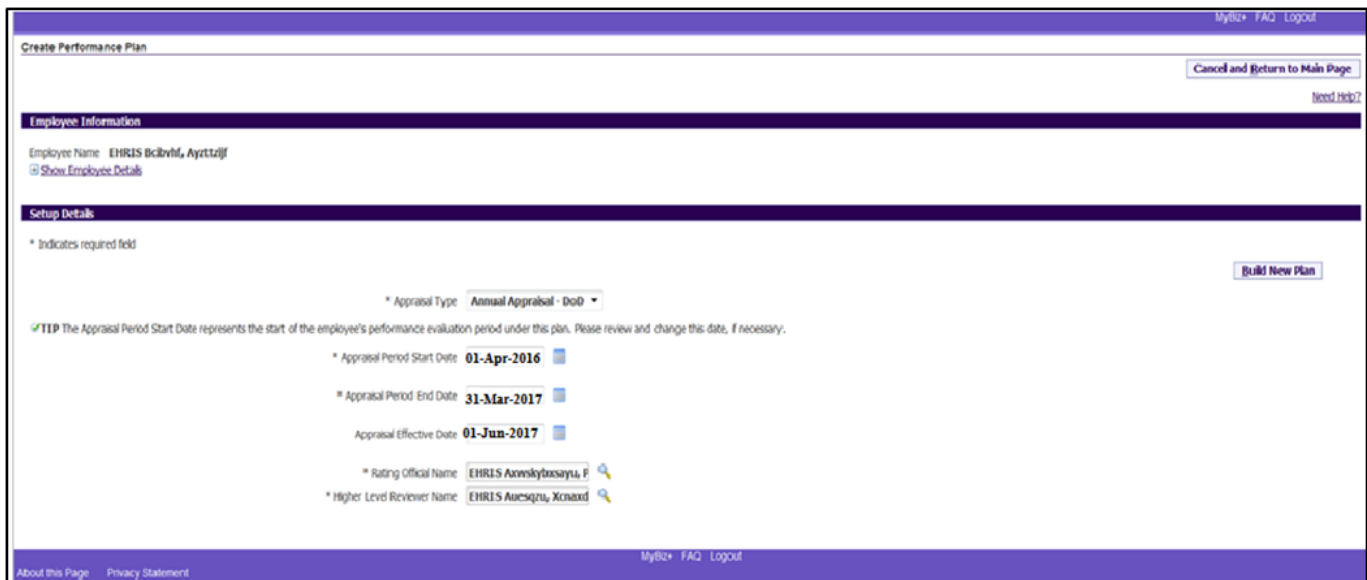


Figure 9 - Create Performance Plan Page

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

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

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

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

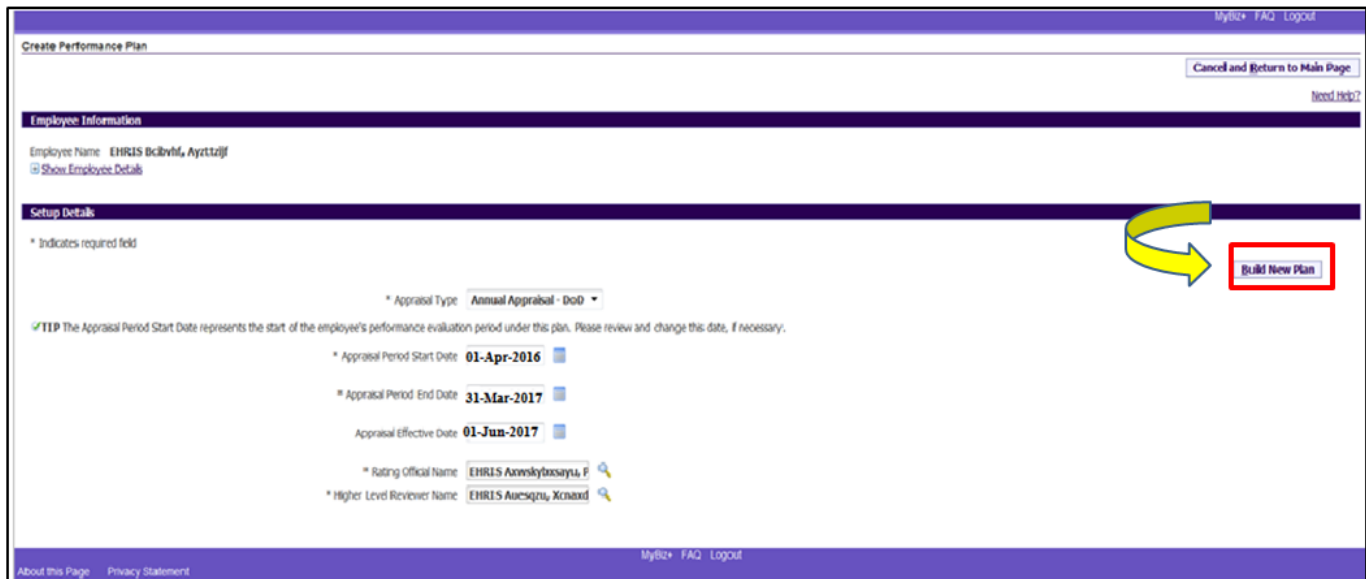


Figure 10 - Create Performance Plan Page

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

The screenshot shows the 'Plan Details' page in the MyPerformance system. At the top, a navigation bar includes 'Plan Reports/Forms' and a breadcrumb trail: 'Step 1: Plan Details > Step 2: Mission Goals > Step 3: Performance Elements and Standards > Step 4: Approvals and Acknowledgments'. Below this is the 'Employee Information' section for EHRIS Bdbvhl, Ayttzjij. A callout box points to the breadcrumb trail with the text 'Select appro step in the p'. The main content area contains instructions for 'Step 1: Plan Details', including a tip to verify appraisal dates and reviewer names. A 'Need Help?' link is highlighted with a red box, and a callout box explains that it provides information on what can be done on each page. The bottom of the page features a footer with 'About this Page', 'Privacy Statement', 'MyBiz', 'FAQ', and 'Logout'.

Plan Reports/Forms

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments

Employee Information

Employee Name EHRIS Bdbvhl, Ayttzjij
[Show Employee Details](#)

This screen allows you to view and change the details of your employee's performance plan.

Step 1: Plan Details

- Verify the appraisal dates and higher level reviewer name is correct, and, if applicable, make the necessary changes.
- Select Save and Continue button at the bottom right corner to move to Step 2: Mission Goals.

TIP: Choose an Action – located at the top right corner – allows for selection of other actions throughout the performance cycle.

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

* Appraisal Type: Annual Appraisal - DoD
* Appraisal Period Start Date: 01-Apr-2016
* Appraisal Period End Date: 31-Mar-2017
* Appraisal Effective Date: 01-Jun-2017
Rating Official Name: EHRIS Aowskybsayy, Pnikmtway U
Higher Level Reviewer: EHRIS Aoesqzu, Xcnaxdu

Performance Plan Approval Date
Plan Last Modified Date
Created By: EHRIS Aowskybsayy, Pnikmtway U

MyBiz FAQ Logout

About this Page Privacy Statement

Figure 11 - Plan>Step 1: Plan Details

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

The screenshot shows the 'Step 2: Mission Goals' page. At the top, there are navigation tabs for 'Step 1: Plan Details', 'Step 2: Mission Goals', 'Step 3: Performance Elements and Standards', and 'Step 4: Approvals and Acknowledgments'. Below this is the 'Employee Information' section for EHRIS Bdbvhl, Ayrtzjif. A text box contains the text: 'DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, ethics, honor, courage, and loyalty.' Below this, instructions state: 'This screen allows you to enter your employee's Component organizational values, mission statements, or goals which apply to their performance elements and standards.' The 'Step 2: Mission Goals' section includes a list of instructions: 'Enter your Component's organizational values, mission statement, or goals directly in the text box or copy and paste from another document.', 'Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards.', and 'Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Details.' A text box for entering goals is shown with the text 'Enter goals here. You have a limit of 1400 characters.' and a 'Counter' field. At the bottom right, there are two buttons: 'Save and Go Back' and 'Save and Continue', with a yellow arrow pointing to the 'Save and Continue' button.

Figure 12 - Plan>Step 2: Mission Goals

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

The screenshot shows the 'Step 3: Performance Elements and Standards' page. At the top, there are navigation tabs for 'Step 1: Plan Details', 'Step 2: Mission Goals', 'Step 3: Performance Elements and Standards', and 'Step 4: Approvals and Acknowledgments'. Below this is the 'Employee Information' section for EHRIS Bdbvhl, Ayrtzjif. Instructions state: 'This screen allows you to add or update a performance element and view approved performance elements for your employee. Performance elements should be written using the SMART criteria. Select [Need more information?](#) link to view the SMART criteria.' The 'Step 3: Performance Elements and Standards' section includes a list of instructions: 'Select Add Performance Element button to add a new performance element and standard(s).', 'Select Update button under the Details Action column to update an unapproved performance element.', 'Select View button under Details Action column to view an approved performance element.', 'Select Delete icon under the Details Delete column to delete a performance element.', 'Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgments.', and 'Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.' Below the instructions is a table with the following columns: 'Details', 'Number', 'Title', 'Status', 'Element Type', 'Action', and 'Delete'. The table content shows 'No results found.' in the 'Details' column. At the bottom right, there are two buttons: 'Save and Go Back' and 'Save and Continue'. A red box highlights the 'Add Performance Element' button, and a yellow arrow points to it.

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

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

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 Help?](#)

Performance Element Number 1

* Performance Element Title PE 1 - Element Title

* Performance Element Start Date 04-Apr-2017
(example: 18-Feb-2016)

Performance Element Status Pending

Date Last Modified 18-Feb-2016

* Performance Element Type Critical

Performance Element and Standard(s)

Enter performance elements and standard(s) here. You have a limit of 1000 characters.

(Limit to 1000 characters)

Spell Check Counter

Figure 14 - Add Performance Element and Standards Page






Table 2 - Performance Element and Standards Fields and Descriptions

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

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

Table 3 – Decision Table for Performance Elements

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

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

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

The screenshot shows a web form titled "Add Performance Element and Standard(s)". At the top right, there are three buttons: "Save", "Save and Add Another Performance Element", and "Go Back to Performance Elements". The "Save" and "Go Back to Performance Elements" buttons are highlighted with red boxes. The form contains the following fields and options:

- Performance Element Number: 1
- * Performance Element Title: PE 1 - Element Title
- * Performance Element Start Date: 05-Apr-2016 (with a calendar icon and example: 18-Feb-2016)
- Performance Element Status: Pending
- Date Last Modified: 18-Feb-2016
- * Performance Element Type: Critical (dropdown menu)

Below these fields is a large text area for "Performance Element and Standard(s)". The text inside reads: "This information is based on the performance element identified in PE 1." At the bottom left of the text area, it says "(Limit to 2000 characters)". At the bottom right, there is a "Spell Check" button and a "Counter" showing "72".

Figure 15 - Add Performance Element and Standards Page

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

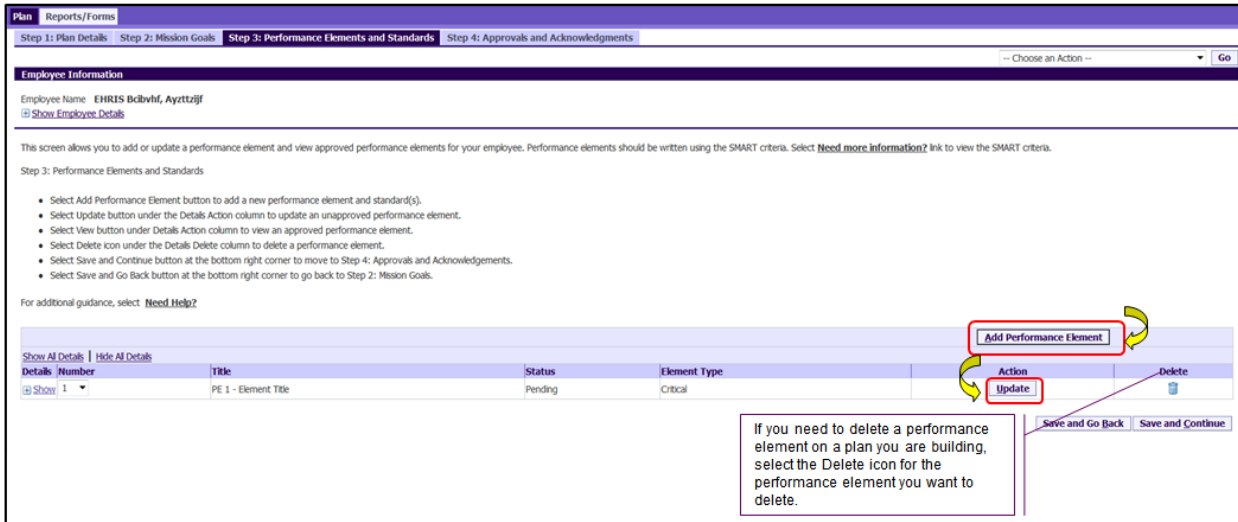


Figure 16 - Plan > Step 3: Performance Elements and Standards

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

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

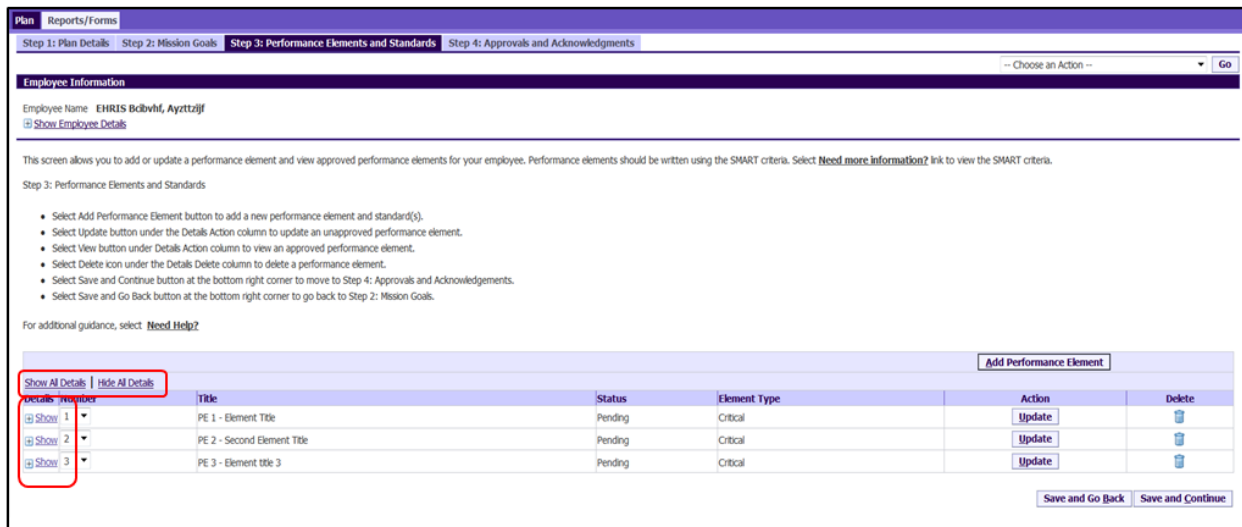


Figure 17 - Plan > Step 3: Performance Elements and Standards

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

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

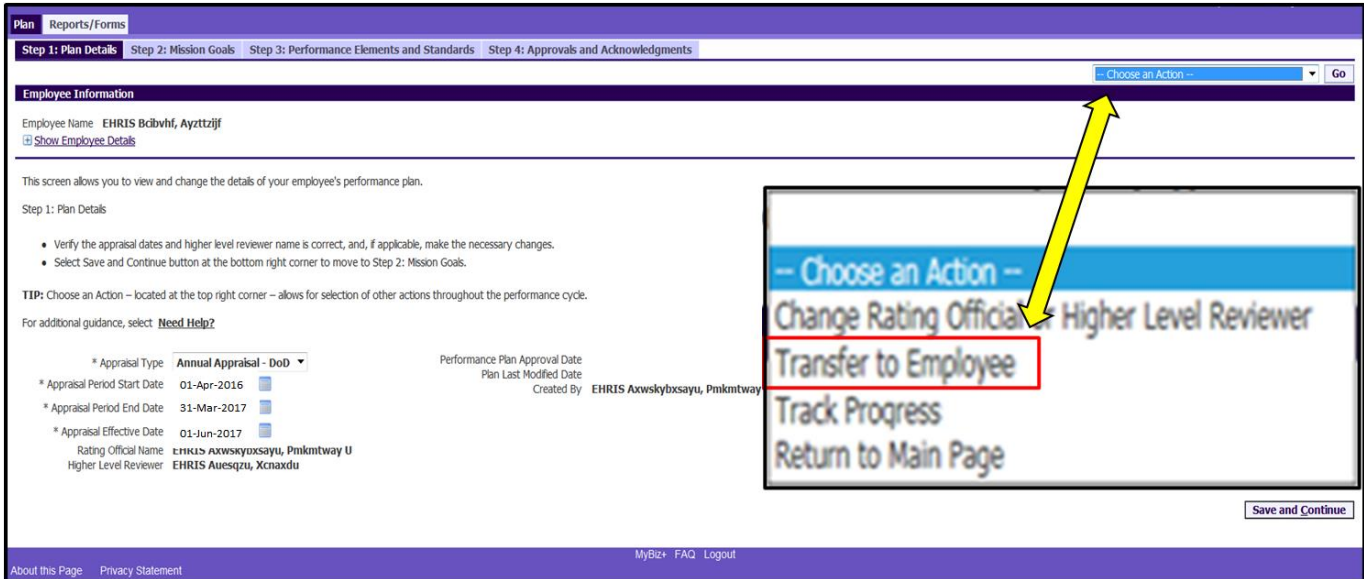


Figure 18 - Plan>Step 1: Plan Details

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

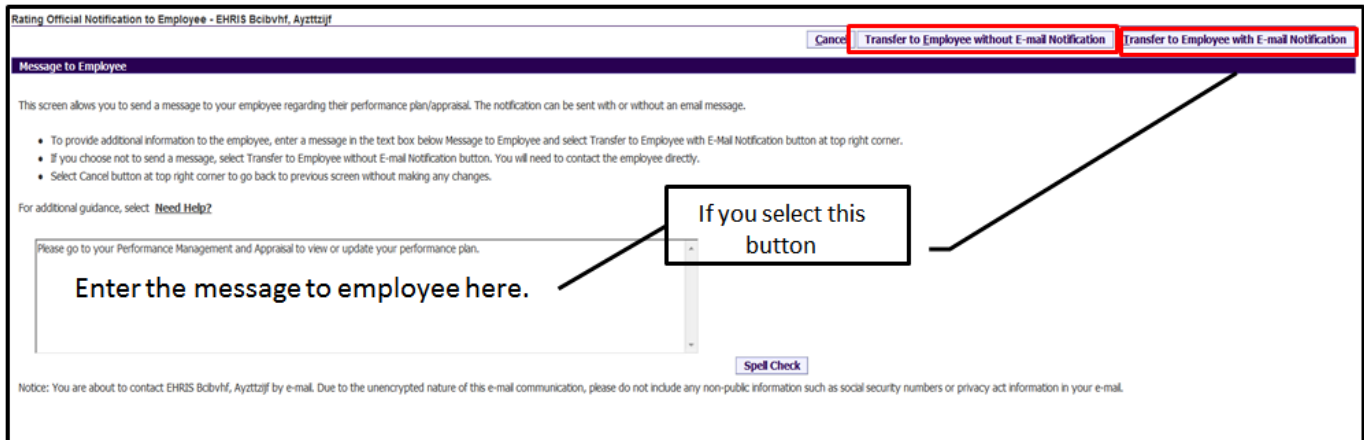


Figure 19 - Rating Official Notification to Employee

NOTE: If the employee does not have an email address in DCPDS, the page that appears will only give you the option to send without email notification. You will also be advised to contact the employee to have them enter an email address for work using MyBiz+.

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

The screenshot shows the 'MyPerformance Main Page' interface. At the top, there is a 'Confirmation' message: 'The appraisal has been submitted to the employee.' Below this, a red warning message states: 'Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.' The page includes instructions on how to create and manage performance plans. A table titled 'Plans/Appraisals In Progress' is displayed, showing two entries for the year 2016. The table has columns for Employee Name, Current Owner, Rating Official Name, Appraisal Year, Appraisal ID, Plan Approval Date, Type, Plan Status, Current Status, and Action.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Aocxagc, Qxetbkcnl L	EHRIS Aocxagc, Qxetbkcnl L	EHRIS Axvskybxsayu, Pmkmtway U	2016	74		DoD	Pending	Plan in Progress	View
EHRIS Bcbvbf, Ayztzjff	EHRIS Bcbvbf, Ayztzjff	EHRIS Axvskybxsayu, Pmkmtway U	2016	84		DoD	Pending	Plan in Progress	View

Figure 20 - Confirmation on MyPerformance Main Page

Performance Plan: Editing the Plan (Rating Official)

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

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

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

Follow these steps to review and edit the performance plan:

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

The screenshot shows the 'MyPerformance Main Page' interface. At the top, there is a navigation bar with 'MyPerformance Main Page' and 'Provide Guest Feedback'. Below this is a 'Warning' message in red text. A section titled 'Plans/Appraisals In Progress' contains a table with columns: Employee Name, Current Owner, Rating Official Name, Appraisal Year, Appraisal ID, Plan Approval Date, Type, Plan Status, Current Status, Action, View, and Go. The 'Action' column for the second row is highlighted with a red box and contains the word 'Update'. A yellow arrow points from the 'Update' button to the 'Go' button in the same row. Above the table, there are filters for 'Show Me' (set to 'All Appraisals') and 'Appraisal Year' (set to 'ALL'). A 'Create New Plan' dropdown menu is also visible.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action	View	Go
EHRIS Aocxagc, Qxetbkcnl L	EHRIS Aocxagc, Qxetbkcnl L	EHRIS Axwskybxsayu, Pmkmtway U	2016	74		DoD	Pending	Plan in Progress	Update		Go
EHRIS BcbvM, Ayztzifj	EHRIS Axwskybxsayu, Pmkmtway U	EHRIS Axwskybxsayu, Pmkmtway U	2016	84		DoD	Pending	Plan in Progress	Update		Go

Figure 21 - MyPerformance Main Page

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

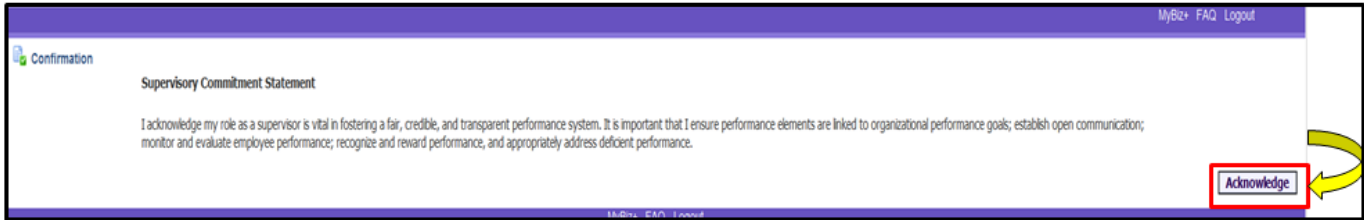


Figure 22 - Supervisory Commitment Statement

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

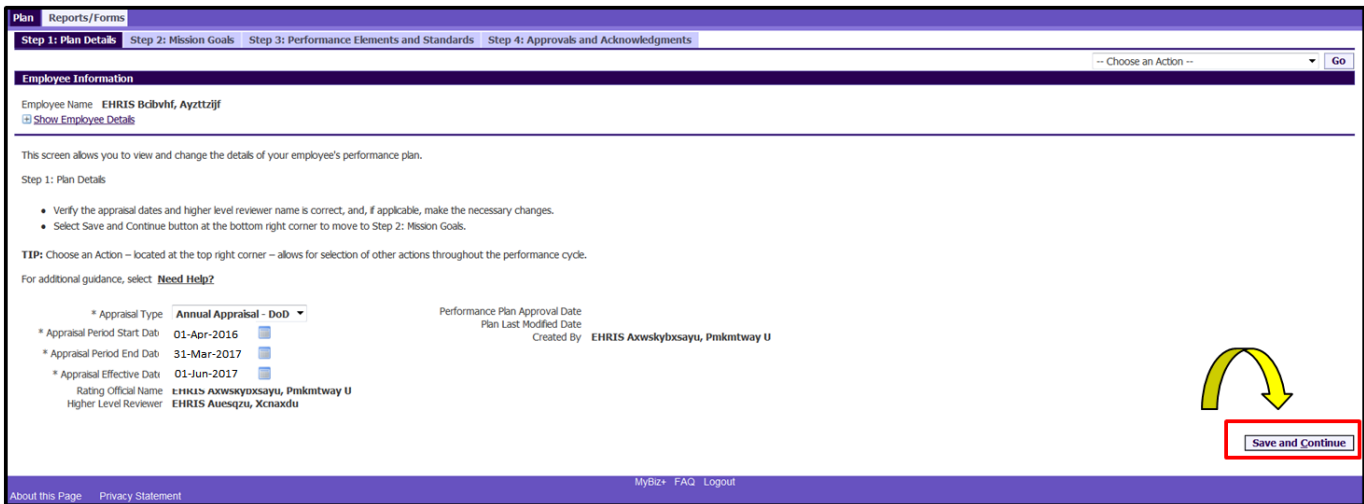


Figure 23 - Plan>Step 1: Plan Details

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

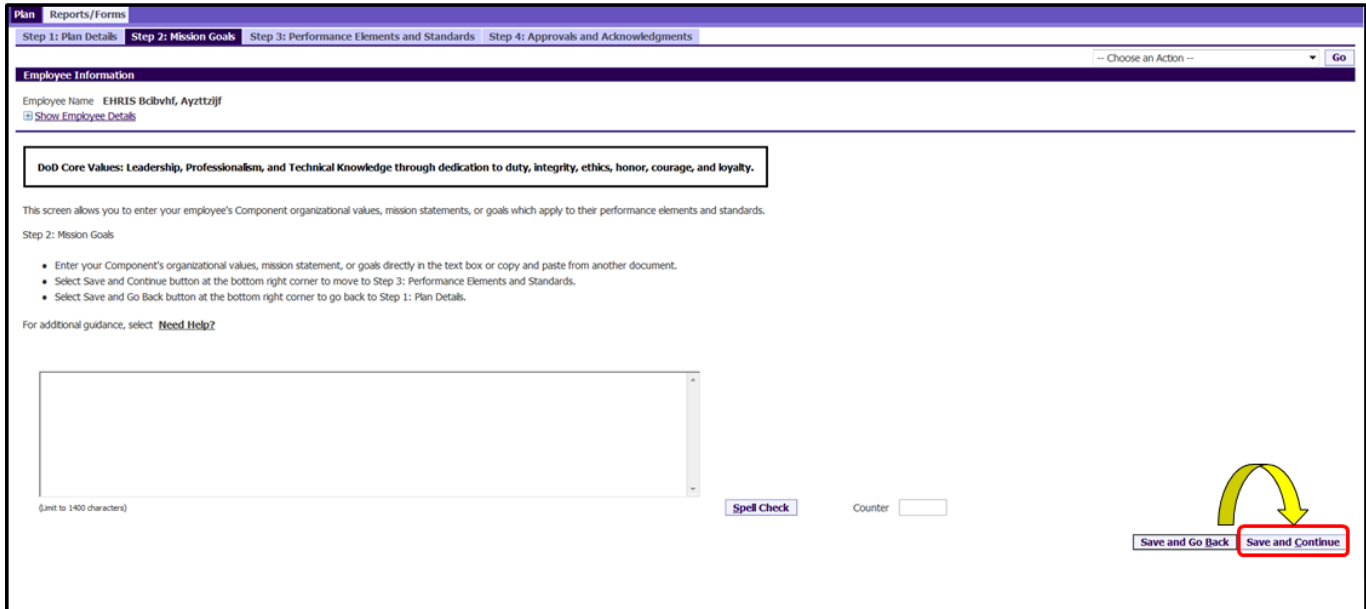


Figure 24 - Plan>Step 2: Mission Goals

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

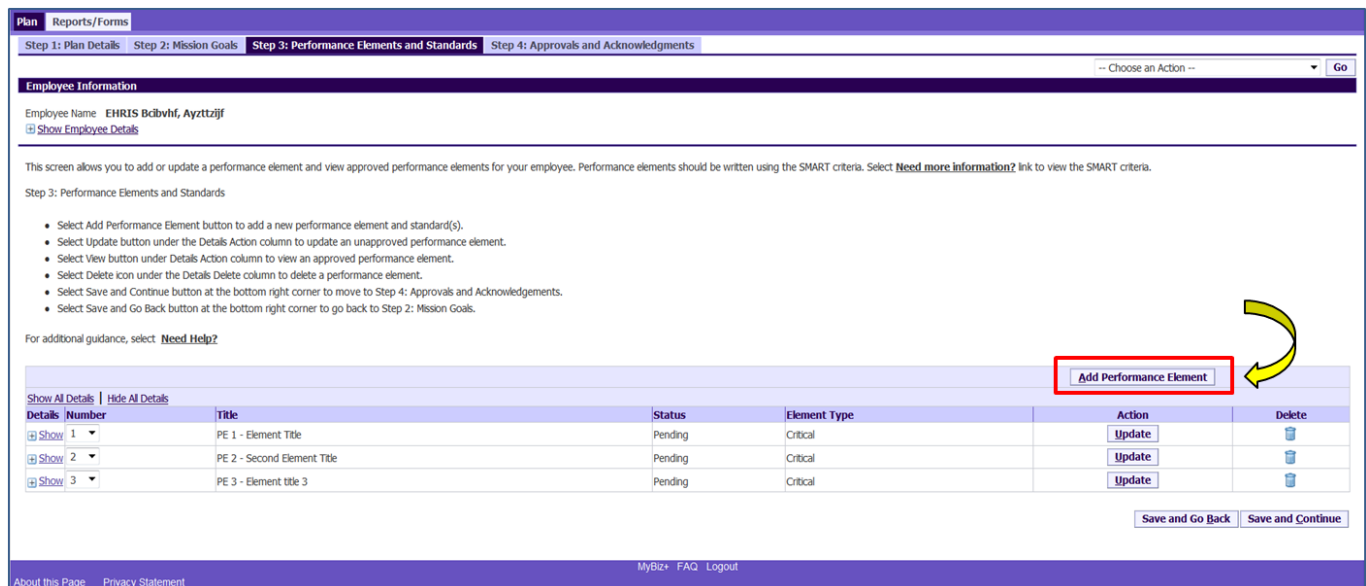


Figure 25 - Plan>Step 3: Performance Elements and Standards

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

Figure 26 - Add Performance Element and Standards

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

Details	Number	Title	Status	Element Type	Action	Delete
Show	1	PE 1 - Element Title	Pending	Critical	Update	[Delete Icon]
Show	2	PE 2 - Second Element Title	Pending	Critical	Update	[Delete Icon]
Show	3	PE 3 - Element title 3	Pending	Critical	Update	[Delete Icon]
Show	4	PE 4 - Element Title 4	Pending	Critical	Update	[Delete Icon]

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

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

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

[Save](#) [Go Back to Performance Elements](#)

This screen allows you to update a performance element and standard(s).

- Verify the Performance Element Title and start date; update the performance element and standard(s) in the text box below, 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 the performance element you worked on and another page will display to add another performance element.
- Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards.
 - If you select Return to Performance Elements button without saving, a warning message will display.

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

Performance Element Number **2**

* Performance Element Title

* Performance Element Start Date (example: 19-Feb-2016)

Performance Element Status **Pending**

Date Last Modified **18-Feb-2016**

* Performance Element Type

Performance Element and Standard(s)

This information would be related to the performance element identified in the title area. This information is added to show the updating of a performance element in this screen.


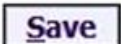
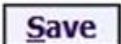

(Limit to 1000 characters)

[Spell Check](#) Counter

Figure 28 - Update Performance Element and Standards

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

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

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

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

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

Performance Plan: Approving the Plan (Rating Official)

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

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

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

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

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

¹ *As required by Component policy IAW DoDI 1400.25 V431

Table 5: Plan Approval Steps

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

Plan Approval Steps

Step Number	Performer	Approval Step	Status	Description
1	Rating Official (RO)	Request or Document Higher Level Review*	Not Started	
			Completed	RO has requested HLR review or documented that HLR review has occurred*
2*	Higher Level Reviewer (HLR), as appropriate	Review	Not Started	
			Completed	HLR has approved the plan
3	Rating Official	Document Communication to Employee	Not Started	
			Completed	RO has entered communication method and date and transferred to the employee or proceeded to Step 4
4	Employee or Rating Official	Document Employee Acknowledgment	Not Started	
			Completed	Employee acknowledged receipt or RO has entered communication method and date

*As required by Component policy IAW DoDI 1400.25 V431

Follow these steps for the performance plan approval:

1. At the *MyPerformance Main Page* select the performance plan you want the higher level reviewer to approve or document the higher level reviewer approval, make sure **Action** column reflects **Update** and select **Go** button. You must have ownership of the performance plan.

MyPerformance Main Page

Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.

You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

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

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

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

Plans/Appraisals In Progress

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

Show Me: All Appraisals | Appraisal Year: ALL

Create New Plan: --Choose a Plan Type-- [Go]

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Aocxiagc, Qxeboknrl L	EHRIS Aocxiagc, Qxeboknrl L	EHRIS Aowskybsayyu, Pmiktmbway U	2016	74		DoD	Pending	Plan in Progress	View [Go]
EHRIS Bcbvnhf, Ayzttzjf	EHRIS Aowskybsayyu, Pmiktmbway U	EHRIS Aowskybsayyu, Pmiktmbway U	2016	84		DoD	Pending	Plan in Progress	Update [Go]

Select the link to search for Completed Plans.
 Show Completed Plans/Appraisals

Figure 29 - MyPerformance Main Page

2. When a rating official has update capability (when **Action** column on *Main Page* reflects **Update**), the rating official must acknowledge (using **Acknowledge** button) that he or she has read and acknowledges his or her role and responsibilities during the appraisal period each time before working in MyPerformance.

Confirmation

Supervisory Commitment Statement

I acknowledge my role as a supervisor is vital in fostering a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals; establish open communication; monitor and evaluate employee performance; recognize and reward performance, and appropriately address deficient performance.

[Acknowledge]

Figure 30 - Supervisory Commitment Statement

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

The screenshot shows the 'Step 4: Approvals and Acknowledgments' tab selected in the navigation bar. Below the navigation bar, there is an 'Employee Information' section with the name 'EHRIS Bclbvhf, Ayttzjif'. A table lists four tasks with their status and action options. The 'Start' button for the first task is highlighted with a red box and a yellow arrow.

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document Higher Level Review	Not Started	Start
Show	Step 2: Higher Level Reviewer - Review	Not Started	Step 1 must be completed
Show	Step 3: Rating Official - Document Communication to Employee	Not Started	Step 2 must be completed
Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

Figure 31 - Plan>Step 4: Approvals and Acknowledgements

4. The *Plan>Step 4: Approvals and Acknowledgements* page will appear. Note the Step 1 task has been opened for detail review and additional information. The following options are available:

Option A: Select Option A if the higher level reviewer needs to review and approve the performance plan.

- Change the name of the higher level reviewer, if necessary.
- Select **Transfer to Higher Level Reviewer with or without email notification.** (If there is no email address for the higher level reviewer, you will only have the option to transfer without email notification.)
- Enter a notification message to the higher level reviewer and select **Transfer to Higher Level Reviewer with E-mail Notification.**

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

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

5. The rating official is navigated to *MyPerformance Main Page* after selecting to transfer to the higher level reviewer with email in **Option A**. The rating official will receive a Confirmation message stating the plan/appraisal has been submitted to the higher level reviewer. Note the **Current Status** is now 'Plan Pending HLR Review.'

The screenshot shows the 'MyPerformance Main Page' with a confirmation message at the top: 'Confirmation: The appraisal has been submitted to the Higher Level Reviewer.' Below this is a 'Warning' about sensitive information. A table titled 'Plans/Appraisals In Progress' lists two entries. The second entry has a 'Current Status' of 'Plan Pending HLR Review', which is highlighted with a red box.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Aocxiagc, Qzextkcnl L	EHRIS Aocxiagc, Qzextkcnl L	EHRIS Axwskybcsayu, Pmkmntway U	2016	74		DoD	Pending	Plan in Progress	View
EHRIS Bcbvfh, Ayztzjzf	EHRIS Auesqzu, Xcnaxdu	EHRIS Axwskybcsayu, Pmkmntway U	2016	84		DoD	Pending	Plan Pending HLR Review	View

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

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

The screenshot shows a form titled 'Option B: Document the higher level review has taken place by entering the following information'. It includes fields for 'Higher Level Reviewer' (EHRIS Auesqzu, Xcnaxdu), 'Review Date', 'Method of Review', and 'Other Method'. Below the form is a table with three rows, each representing a step in the process, all with a status of 'Not Started'.

Step 2: Higher Level Reviewer - Review	Not Started
Step 3: Rating Official - Document Communication to Employee	Not Started
Step 4: Rating Official - Document Employee Acknowledgment	Not Started

Figure 34 - Plan>Step 4: Approvals and Acknowledgements

7. If the higher level reviewer has given the rating official the authority to document the rating official's decisions and the higher level reviewer's approval, the rating official will select Option B. Option B also applies if the rating official is the higher level reviewer or there is no higher level reviewer. The following options are available:

Table 6 – Documenting the Higher Level Reviewer Process

- Change the name of the higher level reviewer, if necessary.
- Document the higher level review has taken place, enter the following information:
 - Enter the Review Date, and
 - Enter Method of Review and Other Method, if necessary (see below chart)

If You ...	Then ...
Communicated the performance plan by face-to-face meeting or telephone	Select Face-to-Face or Telephone from the Communication Method list of values (LOV), as appropriate
Communicated the performance plan using some other method	Select Other from Communication Method LOV and enter a short description of the method in Other field (20 characters maximum)

- Select the **Save** button.

Figure 35 - Plan>Step 4: Approvals and Acknowledgements

8. Certify the information in this performance plan accurately documents the rating official’s decisions and the higher level reviewer’s approval by selecting the **Yes** button.

Figure 36 - Confirmation Certification of Plan Accuracy

9. The next step would be to document communication to employee, select the **Start** button to the right of the task titled: *Step 3: Rating Official - Document Communication to Employee* Start button.

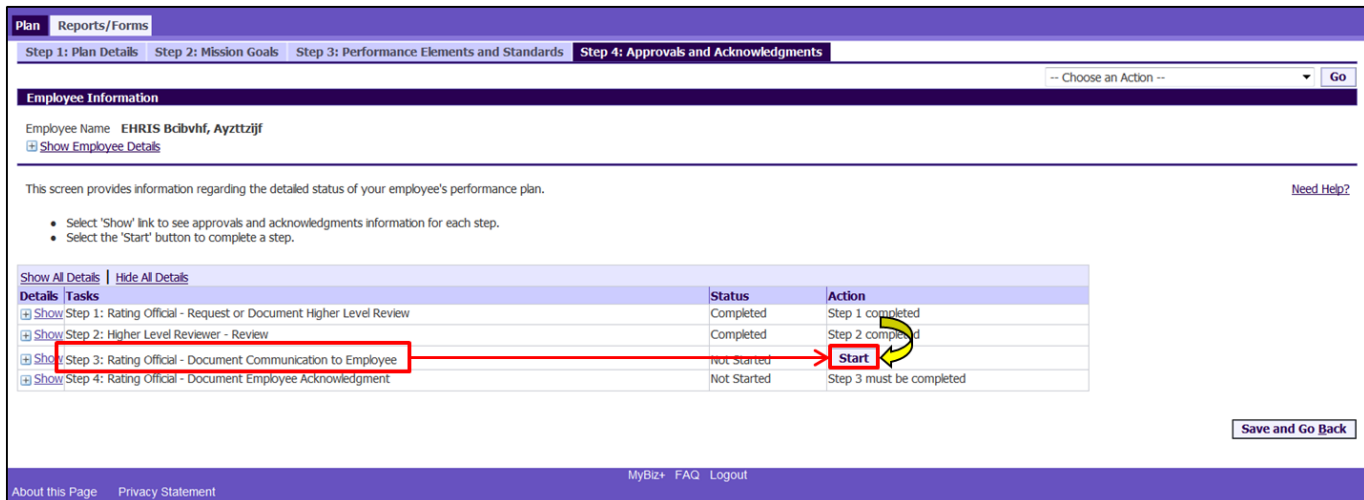


Figure 37 - Plan>Step 4: Approvals and Acknowledgements

10. To document communication with employee has taken place, enter the following information using the table provided.

- Enter the Communication Date, and
- Enter the Communication Method and Other, if necessary (see below chart)

Table 7 – Documenting communication with the employee

If You...	Then...
Communicated the performance plan by face-to-face meeting or telephone	Select Face-to-Face or Telephone from the Communication Method list of values (LOV), as appropriate
Communicated the performance plan using some other method	Select Other from Communication Method LOV and enter a short description of the method in Other field (20 characters maximum)
Tried to communicate to employee and they refused to acknowledge plan or not available to electronically acknowledge it	Select Other from the Communication Method LOV and document it in Other field

Figure 38 - Plan > Step 4: Approvals and Acknowledgments

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

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

Figure 39 - Plan > Step 4: Approvals and Acknowledgments

12. The rating official can send the employee a message regarding the performance plan or transfer to the employee without an E-mail notification. If you need to send an email message, select **Transfer to Employee with E-mail Notification** button. If there is no need for an email message, select **Transfer to Employee without E-mail Notification**.

Figure 40 - Rating Official Notification to Employee

13. The rating official is navigated to *MyPerformance Main Page*. The rating official will receive a **Confirmation** message stating the plan/appraisal has been submitted to the employee. The employee will need to acknowledge receipt of their performance plan.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Aocxiagc, Qxebxkcnl L	EHRIS Aocxiagc, Qxebxkcnl L	EHRIS Axwskybxsayu, Pmkmntway U	2016	74	25-Apr-2016	DoD	Approved	Plan Approved	View <input type="button" value="Go"/>
EHRIS Bcbvhf, Ayzttzjf	EHRIS Bcbvhf, Ayzttzjf	EHRIS Axwskybxsayu, Pmkmntway U	2016	84	15-Apr-2016	DoD	Approved	Plan Approved	View <input type="button" value="Go"/>

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

14. For this scenario, the rating official selects **Save and go to Step 4** button since the employee may refuse to acknowledge the plan or not be available to electronically acknowledge it, etc.

Figure 42 - Plan > Step 4: Approvals and Acknowledgments

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

Figure 43 - Confirmation of Movement to next step

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

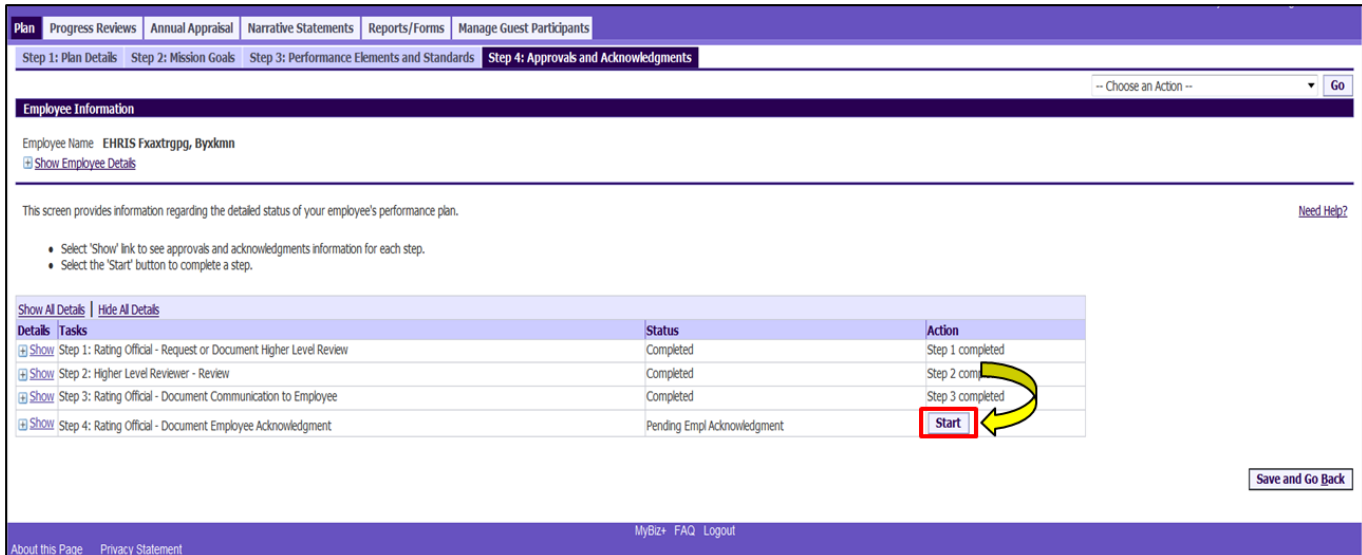


Figure 44 - Plan>Step 4: Approvals and Acknowledgements

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

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

Table 8 – Documenting the employee’s acknowledgment

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

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

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

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards **Step 4: Approvals and Acknowledgments**

Employee Information

Employee Name: EHRIS Fxaxtrggp, Byxkmm
[Show Employee Details](#)

This screen provides information regarding the detailed status of your employee's performance plan.

- Select 'Show' link to see approvals and acknowledgments information for each step.
- Select the 'Start' button to complete a step.

Show All Details | Hide All Details

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document Higher Level Review	Completed	Step 1 completed
Show	Step 2: Higher Level Reviewer - Review	Completed	Step 2 completed
Show	Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed
Hide	Step 4: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	Start

TIP These fields are auto-populated at the time of employee acknowledgment. If the employee is not available or refuses to acknowledge, you may update this area accordingly.

Acknowledgment:

Other Method:

Date:

MyBiz+ FAQ Logout

Figure 45 - Plan>Step 4: Approvals and Acknowledgments

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

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

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards **Step 4: Approvals and Acknowledgments**

Employee Information

Employee Name: EHRIS Fxaxtrggp, Byxkmm
[Show Employee Details](#)

This screen provides information regarding the status of your employee's performance plan. Select 'Show' link to see approvals and acknowledgments information for each step.

Show All Details | Hide All Details

Details	Tasks	Status
Show	Step 1: Rating Official - Request or Document Higher Level Review	Completed
Show	Step 2: Higher Level Reviewer - Review	Completed
Show	Step 3: Rating Official - Document Communication to Employee	Completed
Show	Step 4: Rating Official - Document Employee Acknowledgment	Completed

-- Choose an Action --

- Change Rating Official or Higher Level Reviewer
- Transfer to Rating Official
- Track Progress
- Return to Main Page**

MyBiz+ FAQ Logout

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Figure 46 - Plan>Step 4: Approvals and Acknowledgments

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

MyPerformance Main Page

Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan. You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

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

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

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

Plans/Appraisals In Progress

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

Show Me: All Appraisals | Appraisal Year: ALL

Create New Plan: --Choose a Plan Type-- Go

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Rcozo, Imfytbtp	EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	2016	75	01-Feb-2016	DoD	Approved	Plan Approved	View Go
EHRIS Fxaxtrggp, Byxkmm	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2016	16	01-Jun-2015	DoD	Approved	Plan Approved	Update Go
EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2017	45	04-Jan-2016	DoD	Modified	Plan Returned for Change	Update Go
EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2016	11	03-Aug-2015	DoD	Approved	Plan Approved	Update Go
CPHS Czajkowski, Courtney W	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2016	12	04-May-2015	DoD	Approved	Plan Approved	Update Go
EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2017	38	20-Apr-2016	DoD	Approved	Narrative Statement Completed	Update Go
EHRIS Rcozo, Imfytbtp	EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	2016	41	04-May-2015	DoD	Approved	Pending Employee Acknowledgment	View Go
EHRIS Fxaxtrggp, Byxkmm	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2016	54	01-Mar-2016	DoD	Approved	Plan Approved	Update Go
EHRIS Ckutmuxe, Jajysft	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2017	55	04-Feb-2016	DoD	Approved	Plan Approved	Update Go
EHRIS Rcozo, Imfytbtp	EHRIS Yzqfotzf, Nvmuyezct Z	EHRIS Yzqfotzf, Nvmuyezct Z	2017	56	01-Feb-2016	DoD	Approved	Progress Review in Progress	Update Go

Figure 47 - MyPerformance Main Page