MyPerformance

Rating Official (RO) – How to Create a Performance Plan

All data contained within this simulation is fictional and does not represent any real person, position, or other record of any type.
MyBiz+ for Managers and Supervisors
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 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 ‘Show Completed Plans/Appraisals’ link located at the bottom of this page.

To create a Performance Plan:
- Select ‘Choose a Plan Type’
- Select Appraisal Plan Type
- Select the ‘Go’ button

To complete other actions described above:
- Select an option from the Action column
- Select the ‘Go’ button

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

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

Create New Plan

--Choose a Plan Type--
DoD Performance Management Appraisal Program
Defense Civilian Intelligence Personnel System
National Guard (Title 32)
People in Hierarchy

<table>
<thead>
<tr>
<th>Focal Name</th>
<th>Occupational Code</th>
<th>Position Name</th>
<th>Organization</th>
<th>Performance Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>One, Employee</td>
<td>0560:Budget Analysis (0560)</td>
<td>244014: BUDGET ANALYST.1657727,ARBA,APPR</td>
<td>U S ARMY Garrison Ft Stewart HQ ARBAWVIAA A 01</td>
<td>Create</td>
</tr>
<tr>
<td>Two, Employee</td>
<td>0318:Secretary (0318)</td>
<td>2685919:SECRETARY (DA).1652358,ARBA,APPR</td>
<td>U S ARMY Garrison Ft Stewart HQ ARBAWVIAA A 01</td>
<td>Create</td>
</tr>
</tbody>
</table>
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.
Create Performance Plan

<table>
<thead>
<tr>
<th>Employee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setup Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Appraisal Type</td>
</tr>
<tr>
<td>Annual Appraisal - DoD</td>
</tr>
</tbody>
</table>

TIP: 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.

<table>
<thead>
<tr>
<th>* Appraisal Period Start Date</th>
<th>01-Apr-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Appraisal Period End Date</td>
<td>31-Mar-2017</td>
</tr>
<tr>
<td>Appraisal Effective Date</td>
<td>01-Jun-2017</td>
</tr>
</tbody>
</table>

| * Rating Official Name         |
| Rater, The                    |

| * Higher Level Reviewer Name  |
| Reviewer, Higher Level        |
Create Performance Plan
Create Performance Plan
Step 1: Plan 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: Rater, The
- Higher Level Reviewer: Reviewer, Higher Level

Choose an Action:
- Change Rating Official or Higher Level Reviewer
- Transfer to Employee
- Track Progress
- Return to Main Page
Step 1: Plan Details

Employee Information
Employee Name: One, Employee

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.
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- * 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: Rater, The
- Higher Level Reviewer: Reviewer, Higher Level

Performance Plan Approval Date
Plan Last Modified Date
Created By: Rater, The

[Save and Continue]
Step 2: Mission Goals

DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, ethics, honor, courage, and loyalty.

Enter Mission Goals here (Limit to 1400 characters).
Step 3: Performance Elements and Standards
Add Performance Element and Standards

Enter Performance Element and Standard(s) here (Limit to 1000 characters).
Step 3: Performance Elements and Standards
Step 4: Approvals and Acknowledgments

<table>
<thead>
<tr>
<th>Details/Tasks</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Step 1: Rating Official - Request or Document Higher Level Review</td>
<td>Not Started</td>
<td>Start</td>
</tr>
<tr>
<td>Show Step 2: Higher Level Reviewer - Review</td>
<td>Not Started</td>
<td>Step 1 must be completed</td>
</tr>
<tr>
<td>Show Step 3: Document Communication to Employee</td>
<td>Not Started</td>
<td>Step 2 must be completed</td>
</tr>
<tr>
<td>Show Step 4: Rating Official - Document Employee Acknowledgment</td>
<td>Not Started</td>
<td>Step 3 must be completed</td>
</tr>
</tbody>
</table>

---

**Choose an Action**
- Change Rating Official or Higher Level Reviewer
- Transfer to Employee
- Track Progress
- Return to Main Page
Rating Official Notification to Employee

This screen allows you to send a message to your employee regarding their performance plan/appraisal. The notification can be sent with or without an email message.

- To provide additional information to the employee, enter a message in the text box below Message to Employee and select Transfer to Employee with E-Mail Notification button at top right corner.
- If you choose not to send a message, select Transfer to Employee without E-Mail Notification button. You will need to contact the employee directly.
- Select Cancel button at top right corner to go back to previous screen without making any changes.

For additional guidance, select Need Help?

Enter message to Employee here.
**MyPerformance Main Page**

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- Select the 'Go' button

To complete other actions described above:
- Select an option from the Action column
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### Plans/Appraisals In Progress

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

**Show Me**
- All Appraisals
- Appraisal Year
- ALL

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Current Owner</th>
<th>Rating Official Name</th>
<th>Appraisal Year</th>
<th>Appraisal ID</th>
<th>Plan Approval Date</th>
<th>Type</th>
<th>Plan Status</th>
<th>Current Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>One, Employee</td>
<td>One, Employee</td>
<td>Rater, The</td>
<td>2016</td>
<td>101</td>
<td>DoD</td>
<td>Pending</td>
<td>Plan in Progress</td>
<td>View</td>
<td>Go</td>
</tr>
</tbody>
</table>

Select the link to search for Completed Plans.

Show Completed Plans/Appraisals
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Plans/Appraisals In Progress

Show Me: All Appraisals

Create New Plan

Employee Name: [Employee Name]
Rating Official Name: [Rating Official Name]
Appraisal Year: [Appraisal Year]
Appraisal ID: [Appraisal ID]
Plan Approval Date: [Plan Approval Date]
Type: [Type]
Plan Status: [Plan Status]
Current Status: [Current Status]
Action: [Action]

Select the link to search for Completed Plans:
- Show Completed Plans/Appraisals

Retrieve Reports/Forms
Change RO and/or HLR
Track Progress
MyPerformance Main Page

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**Plans/Appraisals In Progress**

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

<table>
<thead>
<tr>
<th>Show Me</th>
<th>All Appraisals</th>
<th>Appraisal Year</th>
<th>ALL</th>
</tr>
</thead>
</table>

**Records Displayed**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Current Owner</th>
<th>Rating Official Name</th>
<th>Year</th>
<th>Appraisal ID</th>
<th>Plan Approval Date</th>
<th>Type</th>
<th>Plan Status</th>
<th>Current Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>One, Employee</td>
<td>Rater, The</td>
<td>Rater, The</td>
<td>2016</td>
<td>101</td>
<td>DoD</td>
<td>Pending</td>
<td>Plan in Progress</td>
<td>Update</td>
<td></td>
</tr>
</tbody>
</table>

Select the link to search for Completed Plans.

[Show Completed Plans/Appraisals]
Step 4: Approvals and Acknowledgments
Step 1: Rating Official – Request or Document Higher Level Review

Option A – Transfer to the Higher Level Reviewer

- **Name**: Rating Official
- **Title**: Rating Official

**TIP**: Please select new HLR from list of values, if required.

**Change Higher Level Reviewer**: Reviewer, Higher Level

**Message to Higher Level Reviewer**

This screen provides space for you to send a Higher Level Reviewer a message regarding an employee’s Performance Plan. After writing the message, select the 'Transfer to Higher Level Reviewer with E-mail Notification' button to send the message.

Please review this performance plan and take the appropriate action under the Approvals and Acknowledgments tab.

Notice: You are about to contact Reviewer, Higher Level by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail.
Step 1: Rating Official – Request or Document Higher Level Review

Option B - Document the higher level review has taken place

Confirmation
Step 3: Rating Official – Document Communication to Employee
Step 4: Rating Official Document
Employee Acknowledgment
Choose an Action – Track Progress
Track Progress

This screen provides information regarding the status of the performance plan/appraisal throughout the performance cycle.

- Review the performance plan/appraisal status and select Go Back button at top right corner when finished.
- A Print button is located at the top right corner, if you would like to print Track Progress.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Date</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drafted</td>
<td>01-Apr-2016</td>
<td>Rater, The</td>
</tr>
<tr>
<td>Reviewed by Higher Level Reviewer</td>
<td>20-Apr-2016</td>
<td>Rater, The</td>
</tr>
<tr>
<td>Approved</td>
<td>21-Apr-2016</td>
<td>Rater, The</td>
</tr>
<tr>
<td>Communicated to Employee by Rating Official</td>
<td>29-Apr-2016</td>
<td>Rater, The</td>
</tr>
<tr>
<td>Acknowledged by Employee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Choose an Action – Return to Main Page
MyPerformance Main Page