Normally within 30 days of the beginning of each appraisal cycle, supervisors and employees should discuss performance goals for the upcoming cycle. Supervisors must allow employees the opportunity to provide input into their performance elements and standards. While employees have the opportunity to provide input into their performance plans, supervisors must develop and approve the performance elements and standards.

Supervisors must communicate each approved performance plan and how the performance expectations link to any organization goals with their employees. This also provides an opportunity for the supervisor and employee to achieve a common understanding of the performance required for mission success.
From the MyBiz+ home page, select Performance Management and Appraisal link under Manage Functions in Key Services.
The performance plan will clearly document for each employee how the expected outcomes and results are linked to the organization’s goals and objectives and how performance will be measured throughout the appraisal cycle.

From the MyPerformance Main Page, under Create New Plan, select the Choose a Plan Type from the drop-down arrow.

Select DoD Performance Management Appraisal Program and Go button.
You will see all the employees in your hierarchy. From People in Hierarchy screen, find the employee you want to create a performance plan on and select Create button.
A Supervisory Commitment Statement will be received when you create or update an employee’s performance plan/appraisal to acknowledge your role as a supervisor. Select Acknowledge button.
Select Show Employee Details link for an overview of the employee’s position and organization information. This link is available on every page within MyPerformance.
Select the Hide Employee Details link to hide the employee's position and organization information.
The appraisal cycle for employees covered by the DoD Performance Management and Appraisal Program is April 1 through March 31 of each calendar year.

Review the plan Setup Details information and make any necessary changes to the default values.

Select Build New Plan button to go to Step1: Plan Details.
Choose an Action offers several options for the Rating Official to manage their employee’s performance plan/appraisal: Change Rating Official and or Higher Level Reviewer, Transfer to Employee, Track Progress, and Return to Main Page.

The Choose an Action drop down is available for your use on every tab in MyPerformance.
This is the final review of the Setup Details, make necessary changes and select Save and Continue button to move to Step 2: Mission Goals
In order to develop common awareness of and reinforce a high-performance culture, DoD core values will be discussed with employees at the beginning of the appraisal cycle and be annotated on all performance plans. Additionally, DoD components may include organizational values and mission statements or goals which apply to the employee’s performance elements. This aids in developing a common awareness and to reinforcing the individual contribution to the overall success of both the DoD and organization’s mission.

Enter mission goals in the text box (Limit to 1400 characters). Spell Check is available.

Select Save and Continue to go to Step 3: Performance Elements and Standards
The performance standards should be written in the SMART criteria - Specific, Measureable, Achievable, Relevant, and Timely. Select Need more information? link to better understand the SMART criteria.

To add a performance element, select Add Performance Element button.
Enter a Performance Element Title

All performance elements are critical and must contain at least one element with a maximum of ten elements.

Performance elements describe the expectations related to the work being performed. All performance elements must be critical elements and clearly align with organizational goals.

Performance standards describe how requirements and expectations provided in the performance elements are to be evaluated. Performance standards must be provided for each performance element and must be written at the ‘Fully Successful’ level.

Select Save button to periodically save your work, Save and Add Another Performance Element is just that, Go Back to Performance Elements will not save your work.

When finished adding performance elements and standards, select Save and Go Back to Performance Elements buttons.
Returning to Step 3 Performance Elements and Standards, the new performance element information displays on the detail line. From this page you can add, update or delete a performance element.

Select Save and Continue to go to Step 4: Approvals and Acknowledgments.
After the performance plan has been created by the rating official, it may require edits and further input from the employee. The plan could be routed to the employee as an empty shell awaiting input, final document ready for review, or work in progress requiring edits.

After creating the employee’s plan, the manager or supervisor (known as Rating Official) will transfer to the employee to review and provide input.

To transfer to the employee for their review, select Choose an Action, Transfer to Employee, and Go button.
At this point you have the option to transfer to the employee with or without e-mail notification. If you chose to enter comments in the Message to Employee area, your message is included in the e-mail.
Upon transferring the plan to the employee, you will be returned to the MyPerformance Main Page. A Confirmation message will appear at the top of the page.

Your employee’s performance plan information and status is displayed in the Appraisal Details table on the MyPerformance Main Page.
From the Action column, you will notice that you can only view your performance plan and no longer have ownership of it.

At this point in the performance plan process, there are limited actions you can perform under the Action column. Available actions are: View, Retrieve (plan), Reports/Forms, Change Rating Official and/or Higher Level Reviewer and Track Progress.

The rating official can retrieve a performance plan/appraisal at any time during the appraisal lifecycle from the employee or higher level reviewer.
After the employee finishes reviewing and entering comments, the employee will transfer to the rating official to start the approval process for the performance plan.

Action column now reflects Update and rating official has ownership of the performance plan.

Select Go button to open the performance plan.
To start the approval process, navigate to Plan/Step 4: Approvals and Acknowledgments. You can get there by using the navigation buttons or selecting Step 4: Approvals and Acknowledgments.

Select Start button for Step 1: Rating Official – Request or Document Higher Level Review
There are two options under Step 1: Rating Official – Request or Document Higher Level Reviewer: Option A – Transfer to the Higher Level Reviewer. This option is used when the Higher Level Reviewer needs to approve the performance plan.
Option B – Document the higher level review has taken place by entering the following information. This option allows the rating official to certify the information in the performance plan accurately documents the higher level reviewer’s approval.

For this scenario, the rating official completed Option B by entering Review Date and Method of Review from drop down and selecting Save button.

Rating Official will receive a Confirmation message and will have to select No or Yes button.
Since the rating official documented the higher level reviewer’s approval, Step 1: Rating Official – Request or Document Higher Level Review and Step 2: Higher Level Reviewer – Review have been completed.

The rating official still has ownership of the employee’s performance plan.

Performance plans must be clearly communicated to employees and acknowledged by employees.

Select Start button for Step 3: Rating Official – Document Communication to Employee. The rating official will document the Communication Date, Communication Method, and Other, if required. There are two choices the rating official select– Save and Transfer to Employee for Acknowledgment or Save and go to Step 4.

For this scenario, the rating official will select Save and go to Step 4 button.
Once the rating official documents communication to employee, the new tabs are available to complete in the appraisal lifecycle, i.e., Progress Reviews, Annual Appraisals, etc.


The rating official can document employee acknowledgment due to the employee not being able to sign, other (reason in Other Method), no system access, and employee declined. Rating official will document acknowledgment and date and select Save button.
To track progress of the performance plan/appraisal, select –Choose an Action– dropdown, Track Progress and Go button.
Track Progress provides the date and user who performed the action and status of the performance plan/appraisal throughout the performance cycle. Select Go Back to return to the previous page – Step 4: Approvals and Acknowledgments or Print to print a copy of Track Progress.
To return to MyPerformance Main Page, select –Choose an Action– dropdown, Return to Main Page, and Go button.
The Appraisal Details table shows that the Plan Approval Date is April 29, 2016, and the Current Status is Plan Approved. The rating official still has ownership of the employee’s performance plan.