

# MyPerformance

(DoD Performance Management and  
Appraisal Program)

## Trusted Agent User Guide

May 6, 2016

## Manage Trusted Agent Authorization

### Introduction

1. *Manage Trusted Agent Authorization* allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the DoD Performance Management and Appraisal Program MyPerformance tool for employees they identify for the purpose of ~~documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer's performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance, and the rating official or higher level review retains ownership of the plan.~~ The sole purpose of the trusted agent is to document their decisions in the employee's record. This assignment is accomplished in the 'Manager Functions' area of MyBiz+.

### DCPDS Portal

1. To access *MyPerformance tool*, 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+*. **Performance Management and Appraisal** link is located in *Key Services*.
2. 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.

## Rating Officials (Managers and Supervisors) Accessing Manage Trusted Agent Authorization

1. From the *MyBiz+* home page under Manager Functions in Key Services, select the Manage Trusted Agent Authorization link.

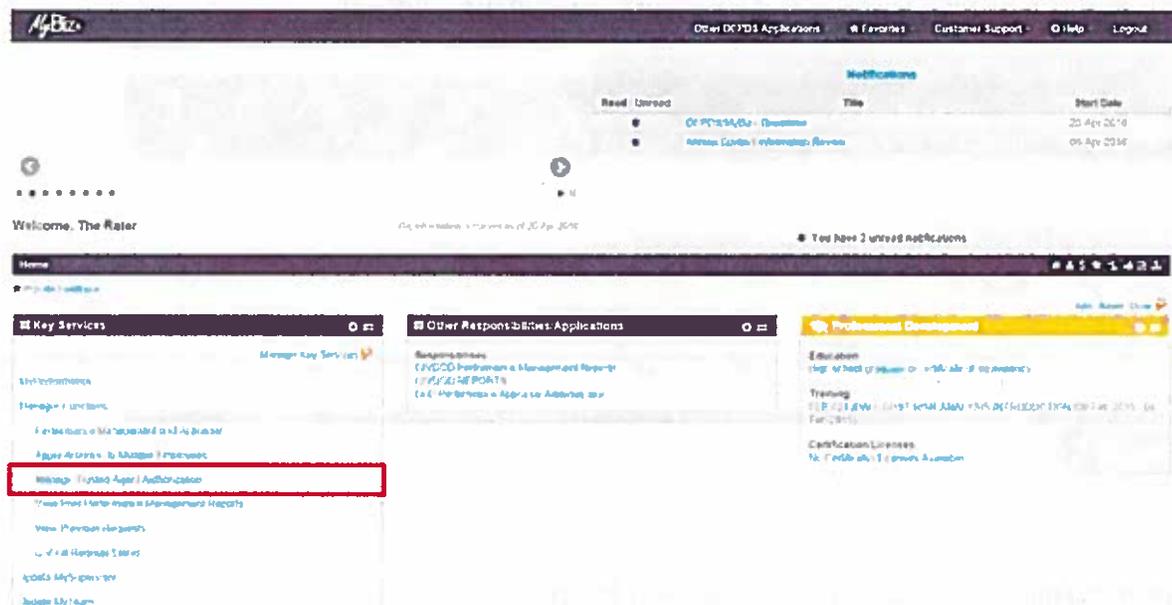


Figure 3- My Biz+ Home Page identifying Manage Trusted Agent Authorization

2. You are now on the *Manage Trusted Agent Assignments Page* where you can assign one or more individuals to act on your behalf for documentation purposes.

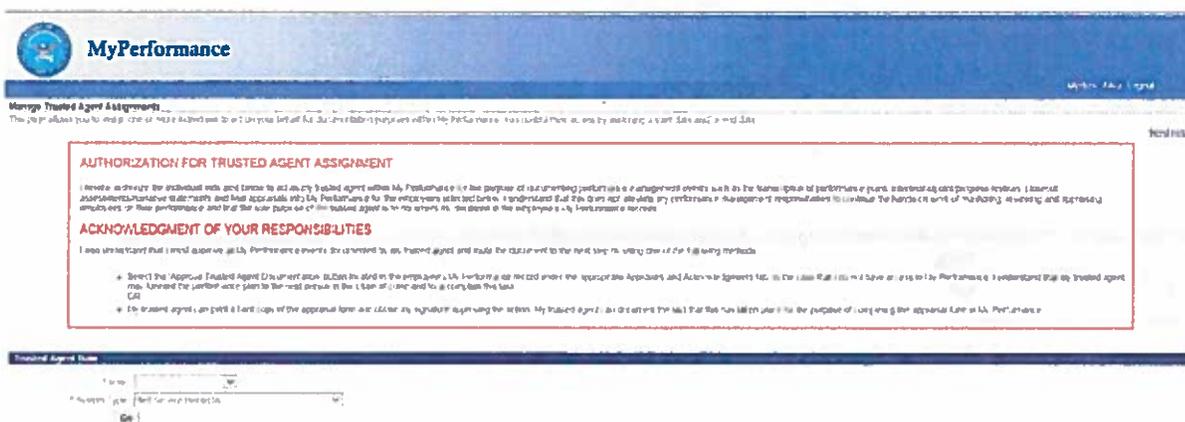


Figure 4 - Manage Trusted Agent Assignments Page

## Assigning Trusted Agent for Individual Employee

- Once you have selected the program, a list of your employees in that program will display. Select employee or employees under the 'Select' column on the results table for whom you want to assign the trust agent authorization.

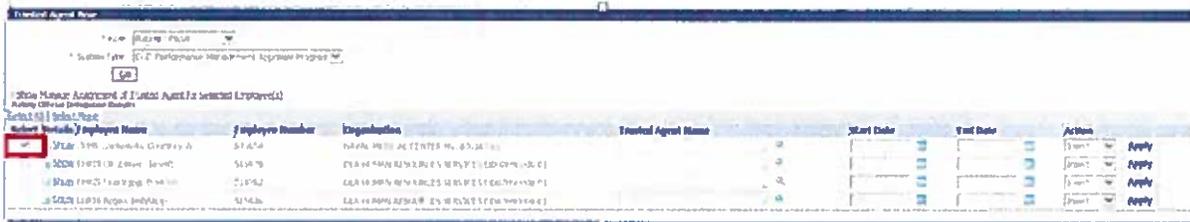


Figure 7 - Manage Trusted Agent Assignments Page – Employee Selection

- The following fields are required: 'Trusted Agent Name' and 'Start Date'. 'End Date' is an optional field. Enter 'Trusted Agent Name'. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the 'Quick Select' icon next to your selection.

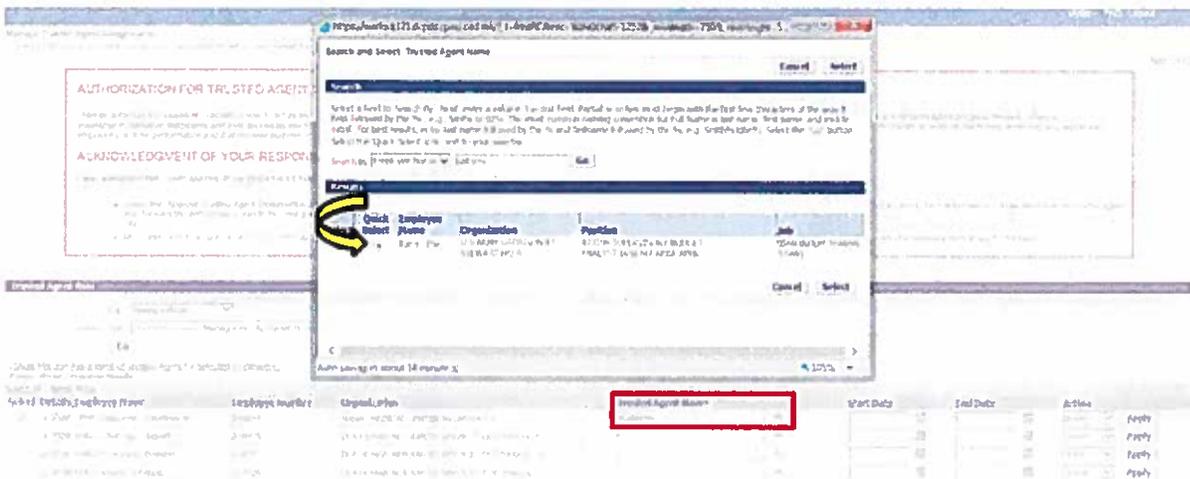


Figure 8 - Manage Trusted Agent Assignments Page – Trusted Agent Name



7. To collapse this area, select **Hide Manage Assignment of Trusted Agent for Selected Employee(s)** link.



Figure 17 - Manage Trusted Agent Assignments Page – Hide Manage Assignment of Trusted Agent

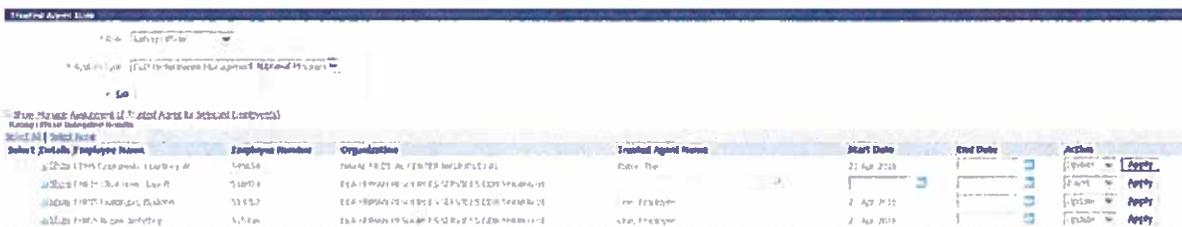


Figure 18 - Manage Trusted Agent Assignments Page

## Terminate Trusted Agent Authorization for Multiple Employees

1. To terminate trusted agent authorization for multiple employees, enter End Date.

**Trusted Agent Role**  
\* Role: Active Medical  
\* System Type: (03) Performance Management Approval Program

**Assign Trusted Agent**  
To assign a Trusted Agent:  
1. Enter Trusted Agent Name  
2. Enter Start Date  
3. Tip: You cannot enter a past date for Start Date.  
4. Optionally, enter an End Date to limit assignment period.  
5. Select employee(s) from results table below.  
6. Select Apply button.

**Terminate Trusted Agent**  
To terminate a Trusted Agent:  
1. Enter End Date.  
2. Tip: The End Date cannot be earlier than the Start Date.  
3. Select employee(s) from results table below.  
4. Select Apply button.

\* Trusted Agent Name: [ ]  
\* Start Date: [ ]  
End Date: [ 22 Apr 2016 ]  
Clear Apply

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016	22 Apr 2016	Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply

Figure 21 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

2. Select the employees under the Select column to terminate trusted agent authorization. Note: End Date must be blank. Select Apply button.

**Trusted Agent Role**  
\* Role: Active Medical  
\* System Type: (03) Performance Management Approval Program

**Assign Trusted Agent**  
To assign a Trusted Agent:  
1. Enter Trusted Agent Name  
2. Enter Start Date  
3. Tip: You cannot enter a past date for Start Date.  
4. Optionally, enter an End Date to limit assignment period.  
5. Select employee(s) from results table below.  
6. Select Apply button.

**Terminate Trusted Agent**  
To terminate a Trusted Agent:  
1. Enter End Date.  
2. Tip: The End Date cannot be earlier than the Start Date.  
3. Select employee(s) from results table below.  
4. Select Apply button.

\* Trusted Agent Name: [ ]  
\* Start Date: [ ]  
End Date: [ ]  
Clear Apply

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply
<input type="checkbox"/>	Shaw, James (Colony), Colony W	54564	NAVAL MEDICAL CENTER (MORBID)	Agree, The	21 Apr 2016		Update	Apply

Figure 22 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

The screenshot shows the DCPDS Portal login page. At the top, there are navigation links: "Login Help", "Contact List", and "Frequently Asked Questions (FAQ)". The page title is "DCPDS PORTAL". On the left, there is a "News and Info" section with several articles. In the center, a "Windows Security" dialog box titled "Select a Certificate" is open, showing two certificates. The second certificate, "Name: DCO CA-31, Valid From: 6/23/2015 to 6/23/2018", is highlighted with a red box, and a red arrow points from the "Smart Card Login" button on the right to this certificate. On the right side of the page, there is a "Smart Card Access" section with a "Smart Card Login" button and a "Non Smart Card Access" button. Below the "Smart Card Access" section, there is a "Returning Non Smart Card (Non CAC) User?" section with a "Non Smart Card Access" button. At the bottom of the page, there is a "Component Help Desk Information" section.

Figure 24 - DCPDS Portal Login Page - Certificate Selection

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

The screenshot shows a "Privacy Act Statement" dialog box. The text inside the dialog box reads: "The information you provide in the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office." Below this text, there are sections for "Authorities", "Principal Purposes", "Routine Uses", and "Dissemination". At the bottom of the dialog box, there is an "Accept" button highlighted with a red box. Below the dialog box, there is a footer: "Accessibility Section 508: Please visit [www.dhs.gov/508](#) | System Help | 2016. Contact us".

Figure 25 - Privacy Act Statement

### 2. You are now on the MyPerformance Main Page as the Trusted Agent.

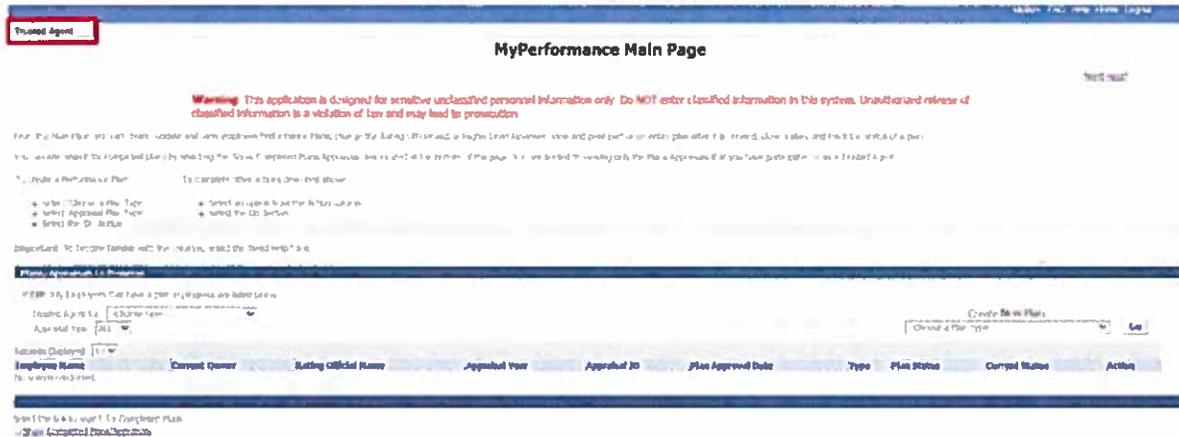


Figure 28 - MyPerformance Main Page as Trusted Agent

### 3. Select the drop down arrow next to Trusted Agent to select the employee you are Trusted Agent for.

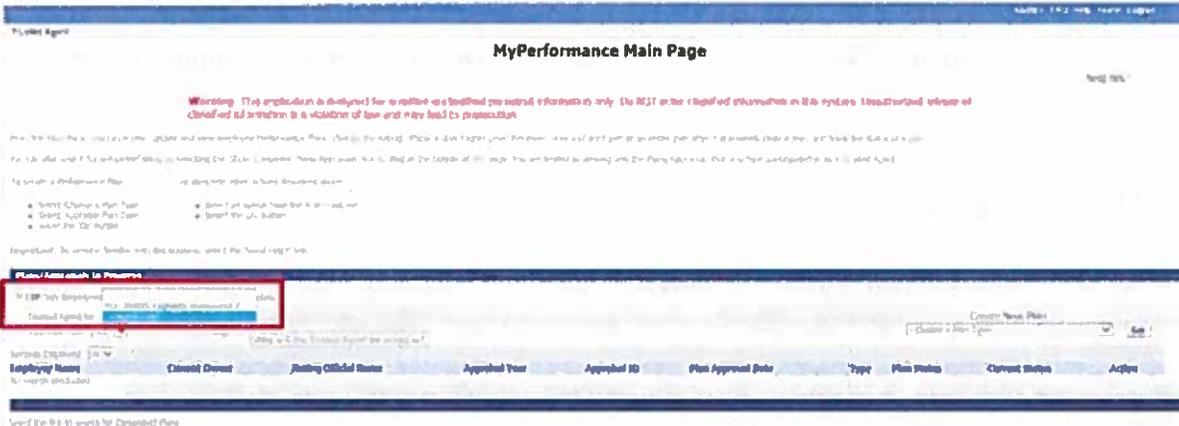


Figure 29 - MyPerformance Main Page Trusted Agent For

### 4. You can select an Appraisal Year by selecting the drop down arrow next to Appraisal Year or leave as ALL. From this screen, you can create, update and/or view a performance plan/appraisal. You have the same responsibilities as the rating official.