



DEPARTMENT OF DEFENSE  
**DCPAS**  
Defense Civilian Personnel Advisory Service

# User Guide: Completing Key Actions in MyPerformance



Table of Contents

<b><u>SECTION 1: EMPLOYEE</u></b> .....	<b>4</b>
<b><u>PERFORMANCE PLAN</u></b> .....	<b>4</b>
<u>Create Performance Plan</u> .....	4
<u>Choose an Action</u> .....	4
<u>Add Mission Goals</u> .....	5
<u>Add Performance Elements and Standards</u> .....	5
<u>Delete Performance Elements and Standards</u> .....	6
<u>Update Performance Elements and Standards</u> .....	6
<u>View Performance Elements and Standards</u> .....	7
<u>Transfer Performance Plan to Rating Official</u> .....	7
<u>Retrieve Performance Plan/Appraisal</u> .....	7
<u>Delete Performance Plan</u> .....	8
<u>Acknowledgment of Performance Plan</u> .....	8
<u>Change Rating Official and Higher Level Reviewer</u> .....	8
<u>View/Print Form</u> .....	9
<u>Track Progress of Performance Plan/Appraisal during the Performance Cycle</u> .....	9
<b><u>PROGRESS REVIEW</u></b> .....	<b>9</b>
<u>Create Progress Review</u> .....	9
<u>Acknowledge Completed Progress Review</u> .....	10
<b><u>ANNUAL APPRAISAL</u></b> .....	<b>10</b>
<u>Enter Employee Input for Annual Appraisal</u> .....	10
<u>View/Print Completed Plans/Appraisals</u> .....	11
<b><u>NARRATIVE STATEMENTS</u></b> .....	<b>11</b>
<u>Create Narrative Statement</u> .....	11
<u>Enter Employee Input for Narrative Statement</u> .....	11
<b><u>SECTION 2 - RATING OFFICIAL</u></b> .....	<b>12</b>
<b><u>PERFORMANCE PLAN</u></b> .....	<b>12</b>
<u>Create Employee's Performance Plan</u> .....	12
<u>Choose an Action</u> .....	13
<u>Update Mission Goals</u> .....	13
<u>Add Performance Elements and Standards</u> .....	13
<u>Delete Performance Elements and Standards</u> .....	14
<u>Update Performance Elements and Standards</u> .....	14
<u>View Performance Elements and Standards</u> .....	15
<u>Request or Document Higher Level Reviewer Approval</u> .....	15
<u>Request or Document Higher Level Reviewer Re-approval</u> .....	16
<u>Document Communication to Employee</u> .....	17
<u>Retrieve Performance Plan/Appraisal</u> .....	18
<u>Change Rating Official and Higher Level Reviewer</u> .....	18
<u>Transfer Performance Plan/Appraisal to Employee</u> .....	18
<u>Document Employee Acknowledgment</u> .....	19
<u>Close Erroneous Performance Plan</u> .....	19
<u>Delete Pending Performance Plan</u> .....	19
<u>Track Progress of Performance Plan/Appraisal during the Performance Cycle</u> .....	20

<b><u>PROGRESS REVIEW</u></b> .....	<b>20</b>
<u>Create Progress Review</u> .....	20
<u>Request or Document Higher Level Reviewer Approval</u> .....	20
<u>Document Communication to Employee</u> .....	21
<b><u>FINAL PERFORMANCE APPRAISAL</u></b> .....	<b>22</b>
<u>Enter Narrative and Ratings</u> .....	22
<u>Update Rating of Record</u> .....	22
<u>Request or Document Higher Level Reviewer Approval</u> .....	22
<u>Document Communication to Employee</u> .....	23
<b><u>NARRATIVE STATEMENTS</u></b> .....	<b>24</b>
<u>Create Narrative Statement</u> .....	24
<u>Enter Narrative with Employee Input</u> .....	24
<u>Document Communication to Employee</u> .....	25

## **SECTION 3 - HIGHER LEVEL REVIEWER**..... **25**

<b><u>PERFORMANCE PLAN</u></b> .....	<b>25</b>
<u>Choose an Action</u> .....	25
<u>Approve Performance Plan</u> .....	26
<u>Return Performance Plan for Change to Rating Official</u> .....	26
<b><u>PERFORMANCE PLAN RE-APPROVAL</u></b> .....	<b>27</b>
<u>Re-approve Performance Plan</u> .....	27
<u>Return Re-approve Performance Plan for Change to Rating Official</u> .....	28
<b><u>PROGRESS REVIEW</u></b> .....	<b>28</b>
<u>Approve Progress Review</u> .....	28
<u>Return Progress Review for Change to Rating Official</u> .....	29
<b><u>FINAL PERFORMANCE APPRAISAL</u></b> .....	<b>29</b>
<u>Review Narrative and Recommended Rating of Record</u> .....	29
<u>Finalize Ratings of Annual Appraisal</u> .....	30
<u>Return Annual Appraisal for Change to Rating Official</u> .....	30

# Section 1: Employee

## Performance Plan

### Create Performance Plan

1. Login to *MyBiz+* at <https://compo.dcpds.cpms.osd.mil/>.
2. Select 'MyPerformance' link under Key Services.
3. On *MyPerformance Main Page*, create a new performance plan by selecting 'DoD Performance Management Appraisal Program' (DPMAP) from the Create New Plan 'Choose a Plan Type' drop-down menu.
4. Select 'Go' button to display *Create Performance Plan* page.
5. Employee Information is available for reference consisting of position information as of the current date. If there are any discrepancies, contact the servicing HRO before moving ahead.
6. Review the Setup Details information and make any necessary changes to the default values in the performance plan setup details.
  - If the information is not correct:
  - Enter dates by using calendar icon or enter date (DD-MMM-YYYY)
  - Select magnifying glass icon to the right of the name of the rating official or higher level reviewer, if you need to change.
7. To create a new performance plan, select 'Build New Plan' button.
8. You will be navigated to *Step 1: Plan Details* tab, review and make any necessary changes.
9. Select 'Logout' link in upper right hand corner to end session.

### Choose an Action

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' or 'View' from the Action column drop-down menu.
3. Select 'Go' button.

NOTE: Choose an Action is available on every tab in the DoD Performance Management Appraisal Program.

4. Select 'Choose an Action drop down arrow, select the action and select 'Go' button to perform different actions throughout the performance cycle.

NOTE: Selection from Choose an Action depends on if you have Update or View capability for your performance plan/appraisal.

- Change Rating Official or Higher Level Reviewer
- Retrieve Plan/Appraisal
- Track Progress
- Return to Main Page

## Add Mission Goals

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 2: Mission Goals* tab.
5. Enter organization's goals and priorities.
  - If information is not included about your Component's goals and priorities, employees are encouraged to provide this information. It helps you write effective performance elements that align with your Component's mission goals and priorities.
  - You may type directly into the text box or copy and paste from another document. The 'Spell Check' button is available if you wish to check the spelling of the text.
6. Select 'Save and Continue' button or *Step 3: Performance Elements and Standards* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

## Add Performance Elements and Standards

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab.
5. Select 'Add Performance Element' button to create a new performance element and standard(s).
6. Enter Performance Element Title.
7. Change the start date, if the default value is incorrect.
8. Enter your performance element and standard(s) text. You may type directly into the text box or copy and paste from another document. The 'Spell Check' button is available if you wish to check the spelling of the text.

**NOTE:** Performance plans must have at least one and no more ten performance elements and standards.

9. Select one of the following buttons:
  - Select 'Save' button periodically to save the performance element and standard(s) and continue writing.
  - Select 'Save and Add Another Performance Element' button to save and begin writing another performance element and standard(s).
  - Select 'Go Back to Performance Elements' button when you are finished entering performance elements and standards or do not want to save a performance element and standard(s). Confirm by selecting 'No' button to not save or 'Yes' button to save changes made to the performance element.
10. After you have completed adding performance elements and standards, select 'Go Back to Performance Elements' button.
11. Select 'Save and Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

## Delete Performance Elements and Standards

**NOTE:** You may not delete a performance element once it is approved by the higher level reviewer.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab to list the performance elements and standards.
5. Select 'Delete' icon for the performance element and standard(s) you want to delete.
6. Select 'Save and Continue' button to continue with the process or 'Logout' link in upper right hand corner to end session.

## Update Performance Elements and Standards

**NOTE:** Employees cannot update an approved performance element and standard(s). Changes to approved elements must be made by rating official. Employees can add new performance elements after the performance plan has been approved; however, the plan status changes to modified status and must be re-approved.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab to list your performance elements.
5. Select 'Update' button for the performance element and standard(s) you want to update.
6. You can update the following performance element and standard(s) information:
  - Performance element title.
  - Performance element start date.
  - Performance element and standard(s) text.
7. Select one of the following buttons:
  - Select 'Save' button periodically to save the performance element and standard(s) and continue writing.
  - Select 'Save and Add Another Performance Element' button to save and begin writing another performance element and standard(s).
  - Select 'Go Back to Performance Elements' button when you are finished entering performance elements and standards or do not want to save a performance element and standard(s). Confirm by selecting 'No' button to not save or 'Yes' button to save changes made to the performance element.
8. After you have completed adding performance elements and standards and select 'Go Back to Performance Elements' button.
9. Select 'Save and Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

## View Performance Elements and Standards

1. Begin at *MyPerformance Main Page*.
2. Depending on ownership of performance plan, select 'Update' or 'View' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab to list your performance elements and standards.
5. To view an existing performance element and standard(s), select 'Update' or 'View' from the Action column.
6. After you have completed viewing a performance element and standard(s), select 'Go Back to Performance Elements' button. Continue step to view all performance element and standard(s).
7. Select 'Save and Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

## Transfer Performance Plan to Rating Official

1. Begin at *MyPerformance Main Page*.
2. Select 'Transfer to Rating Official' from the Action column drop-down menu.
3. Select 'Go' button.
4. If the rating official has an email address on file, enter an email message to the rating official indicating that you are transferring the performance plan. The 'Spell Check' button is available if you wish to check the spelling of the text.
5. Select 'Transfer to Rating Official' without or with email notification button at the top of the *Employee Notification to Rating Official* page.
6. You will be navigated back to *MyPerformance Main Page* and a Confirmation message will be displayed at top of page stating that the appraisal has been submitted to the rating official.
7. Select 'Logout' link in the upper right hand corner to end session.

## Retrieve Performance Plan/Appraisal

**NOTE:** Performance plans can only be retrieved if the new owner has not touched it.

1. Begin at *MyPerformance Main Page*.
2. Action column reflects View, select 'Retrieve' from the Action column drop-down menu.
3. Select 'Go' button.
4. The Action column will reflect 'Update' instead of View.
5. Proceed with any changes or updates to performance plan and transfer the plan again as previously instructed or select 'Logout' link in upper right hand corner to end session.

## Delete Performance Plan

**NOTE:** You can only delete a pending performance plan that you created and has not been transferred to the rating official.

1. Begin at *MyPerformance Main Page*.
2. Select 'Delete' from the Action column drop-down menu.
3. Select 'Go' button
4. Select 'Yes' button to continue after reviewing warning message. You will be navigated back to *MyPerformance Main Page*.
5. Select 'Logout' link in the upper right hand corner to end session.

## Acknowledgment of Performance Plan

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab for a final review.
5. Select *Step 4: Approvals and Acknowledgments* tab.
6. In Step 4: Employee - Acknowledgment, select 'Acknowledge Receipt' button.
7. Enter the date you acknowledged the performance plan by selecting the 'calendar' icon or entering date (DD-MMM-YYYY).
8. Select 'Save' button. If the rating official has an email on file, they will receive an email notification of your acknowledgement; if not, notify them directly.
9. Select 'Choose an Action' drop down arrow in upper right hand corner of screen and select 'Return to Main Page', then select 'Go' button to continue with the process or 'Logout' link in the upper right hand corner to end session.

## Change Rating Official and Higher Level Reviewer

1. Begin at *MyPerformance Main Page*.
2. Select 'Change RO and/or HLR' from the Action column drop-down menu.
3. Select 'Go' button.
4. Use the 'magnifying glass' icon or enter name to change the rating official and/or higher level reviewer.
5. Select 'Continue' button to continue with the process.
6. If desired, make changes to the email notification message to the rating official/higher level reviewer. If rating official needs to be changed, select 'Change Rating Official' with or without email notification button. If higher level reviewer needs to be changed, select 'Change Higher Level Reviewer' with or without email notification button.
7. A Confirmation message is displayed, select 'OK' button to confirm that the rating official/higher level reviewer has been changed. You will be navigated to *MyPerformance Main Page*.
8. Select 'Logout' link in the upper right hand corner to end session.



## View/Print Form

1. Begin at *MyPerformance Main Page*.
2. Select 'View/Print Form' from the Action column drop-down menu.
3. Select 'Go' button.
4. 'Select View/Print Form' button.
5. You can open, save or cancel the PDF file. Select 'Open' button.
6. Review Working Copy of DD Form 2906 and print, if desired, and select 'X' at the top right hand corner to close.
7. Select 'Logout' link in upper right hand corner to end session.

## Track Progress of Performance Plan/Appraisal during the Performance Cycle

**NOTE:** Track Progress displays the plan, progress review and annual appraisal progress and what still must be completed.

1. Begin at *MyPerformance Main Page*.
2. Select 'Track Progress' from the Action column drop-down menu.
3. Select 'Go' button.
4. Review the status of performance plan.
5. Select 'Print' button to print track progress.
6. Select 'Go Back' button to continue or 'Logout' link in upper right hand corner to end session.

## Progress Review

### Create Progress Review

**NOTE:** Employee has to acknowledge the performance plan before the *Progress Review* tab will available.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Approved.'

3. Select 'Go' button.
4. Select *Progress Reviews* tab.
5. Select 'Create Progress Review' button.
6. The *Assessments* tab is open.

**IMPORTANT NOTE:** Please disregard the Assessments tab as this does not apply to DPMAP, system modifications are pending.

7. Select 'Return to Progress Reviews' button or 'Logout' link in upper right hand corner to end session.

## Acknowledge Completed Progress Review

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review in Progress.'

3. Select 'Go' button.
4. Select *Progress Reviews* tab and 'Update' button, then navigate to *Approvals and Acknowledgments* tab.
5. In 'Step 4: Employee - Acknowledgment', select 'Acknowledge Receipt' button.
6. Enter the date you acknowledged the progress review by selecting the 'calendar' icon or enter date (DD-MMM-YYYY).
7. Select 'Return to Progress Reviews' button to continue with the process. Selecting the 'View History' button will display a PDF file of the progress review.
8. Select 'Logout' link in upper right hand corner to end session.

## Annual Appraisal

### Enter Employee Input for Annual Appraisal

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Completed' or 'Plan Approved.'

3. Select 'Go' button.
4. Select *Annual Appraisal* tab which opens the *Assessments* tab.
5. Select radio button for the performance element and standard(s) for which you want to enter input.
6. Type input into the box. You may copy and paste this data into the appropriate box from MS Word or 'My Journal'. The 'Spell Check' button is available if you wish to check the spelling of the text.
7. Select 'Go to Next Performance Element' button for each performance element and standard(s). Repeat steps 5, 6 and 7 until input is complete. Select 'Go Back to Top of Page' button when all input has been entered.
8. Transfer input to your rating official by selecting the 'Choose an Action' drop down arrow in upper right hand corner of screen and select 'Transfer to Rating Official', then select 'Go' button.
9. If the rating official has an email address on file, enter an email message to the rating official indicating that you are transferring the annual appraisal. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Transfer to Rating Official' without or with email notification button at the top of the *Employee Notification to Rating Official* page.

11. You will be navigated back to *MyPerformance Main Page* and a Confirmation message will be displayed at top of page stating that the appraisal has been submitted to the rating official.
12. Select 'Logout' link in the upper right hand corner to end session.

### **View/Print Completed Plans/Appraisals**

1. Begin at *MyPerformance Main Page*.
2. Select 'Show Completed Plans/Appraisals' link at the bottom left hand corner of page.
3. Enter the ending appraisal year in Appraisal Year and select DoD Annual Appraisal from the list of values for the Event to limit your search.
4. Select 'Find' button.
5. Select printer icon under the Reports/Forms column. You can open, save or cancel the PDF file. Select 'Open' button.
6. Review the appraisal and select red 'X' at the top right hand corner to close or select 'Logout' link in upper right hand corner to end session.

## **Narrative Statements**

### **Create Narrative Statement**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Narrative Statements* tab.
5. Select 'Create Narrative Statement' button. Select 'Yes' button to continue after reviewing information message.
6. Select 'Go Back to Narrative Statements' button or 'Logout' link in upper right hand corner to end your session.

### **Enter Employee Input for Narrative Statement**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Narrative Statements* tab.
5. Select 'Update' button from the Action column.
6. The *Assessments* tab is open.
7. Select radio button for the performance element and standard(s) for which you want to enter input.
8. Enter input into the 'Employee Input' box. You may copy and paste this data into the appropriate box from MS Word or 'My Journal'. The 'Spell Check' button is available if you wish to check the spelling of the text.
9. Select 'Go to Next Performance Element' button for each performance element and standard(s). Repeat steps 7, 8 and 9 until input is complete. Select 'Go Back to Top of Page' button when all inputs have been entered.
10. Select 'Return to Narrative Statements' button.

11. Transfer input to your rating official by selecting the 'Choose an Action' drop down arrow in upper right hand corner of screen and select 'Transfer to Rating Official', then select 'Go' button.
12. If the rating official has an email address on file, enter an email message to the rating official indicating that you are transferring the annual appraisal. The 'Spell Check' button is available if you wish to check the spelling of the text.
13. Select 'Transfer to Rating Official' without or with email notification button at the top of the *Employee Notification to Rating Official* page.
14. You will be navigated back to *MyPerformance Main Page* and a Confirmation message will be displayed at top of page stating that the appraisal has been submitted to the rating official.
15. Select 'Logout' link in the upper right hand corner to end session.

## Section 2 - Rating Official

### Performance Plan

#### Create Employee's Performance Plan

1. Login to MyBiz+ at <https://compo.dcpds.cpms.osd.mil/>.
2. Select 'Performance Management and Appraisal' link from Manager Functions under Key Services.
3. On *MyPerformance Main Page*, create a new performance plan by selecting 'DoD Performance Management Appraisal Program' from the Create New Plan 'Choose a Plan Type' drop-down menu.
4. Select 'Go' button.
5. Identify the employee from your hierarchy for whom you wish to create a plan and select 'Create' button from the Performance Plan column.
6. Review Supervisory Commitment Statement and select Acknowledge button.

**NOTE:** When a Rating Official creates a new plan or updates an existing appraisal, the supervisor must acknowledge that he or she has read and agrees to fulfill the identified responsibilities during the appraisal period each time before working in MyPerformance.

7. Review the *Setup Details* information and make any necessary changes to the default values in the performance plan setup details.
  - If the information is not correct:
  - Enter dates by using 'calendar' icon or enter date (DD-MMM-YYYY)
  - Select 'magnifying glass' icon to the right of the name of the rating official or higher level reviewer, if you need to change them.
8. To create a new performance plan, select 'Build New Plan' button.
9. You will be navigated to *Step 1: Plan Details*, review and make any necessary changes.
10. Select 'Logout' link in upper right hand corner to end session.

## Choose an Action

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' or 'View' from the Action column drop-down menu.
3. Select 'Go' button.

NOTE: Choose an Action is available on every tab in the DoD Performance Management Appraisal Program.

4. Select 'Choose an Action drop down arrow, select the action and select 'Go' button to perform different actions throughout the performance cycle.

NOTE: Selection from Choose an Action depends on if you have Update or View capability for your employee's performance plan/appraisal.

- Change Rating Official or Higher Level Reviewer
- Retrieve Appraisal
- Transfer to Employee
- Track Progress
- Return to Main Page

## Update Mission Goals

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 2: Mission Goals* tab.
6. Enter your organization's goals and priorities.
  - If information is not included about your organization's goals and priorities, you are encouraged to provide this information. It helps your employees write effective performance elements and standards that align with your organization's goals and priorities.
  - You may type directly into the text box or copy and paste from another document. The 'Spell Check' button is available if you wish to check the spelling of the text.
7. Select 'Save and Continue' button or *Step 3: Performance Elements and Standards* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

## Add Performance Elements and Standards

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 3: Performance Elements and Standards* tab.

6. Select 'Add Performance Element' button to create a new performance element and standard(s).
7. Enter performance element title.
8. Change the start date, if the default value is incorrect.
9. Enter your performance element and standard(s) text. You may type directly into the text box or copy and paste from another document. The 'Spell Check' button is available if you wish to check the spelling of the text.

**NOTE:** Performance plans must have at least one and no more ten performance elements and standards.

10. Select one of the following buttons:
  - Select 'Save' periodically to save the performance element and standard(s) and continue writing.
  - Select 'Save and Add Another Performance Element' to save and begin writing another performance element and standard(s).
  - Select 'Go Back to Performance Elements' when you are finished entering performance elements and standards or do not want to save a performance element and standard(s). Confirm by selecting 'No' button to not save or 'Yes' button to save changes made to the performance element.
12. After you have completed adding performance elements and standards and select 'Go Back to Performance Elements' button.
13. Select 'Save and Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

### Delete Performance Elements and Standards

**NOTE:** Approved performance elements and standards can be deleted by the rating official, but the performance plan will require re-approval.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab to list the employee's performance elements and standards.
5. Select 'Delete' icon for the performance element and standard(s) you want to delete. Confirm by selecting 'No' or 'Yes' button to delete the performance element and standard(s).
6. Select 'Save and Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

### Update Performance Elements and Standards

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.

5. Select *Step 3: Performance Elements and Standards* tab to list the employee's performance elements and standards.
6. RO can update the following performance element and standard(s) information:
  - Performance element title.
  - Performance element start date.
  - Performance element and standard(s) text.
7. Select one of the following buttons:
8. Select 'Save' periodically to save the performance element and standard(s) and continue writing.
9. Select 'Save and Add Another Performance Element' to save and begin writing another performance element and standard(s).
10. Select 'Go Back to Performance Elements' when you are finished entering performance elements and standards or do not want to save a performance element and standard(s). Confirm by selecting 'No' button to not save or 'Yes' button to save changes made to the performance element.
11. After you have completed adding performance elements and standards, select 'Go Back to Performance Elements' button.
12. Select 'Save and Continue' button or '*Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

**NOTE:** Approved performance elements and standards can be updated, but the performance plan must be re-approved.

### **View Performance Elements and Standards**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' or 'View' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Select *Step 3: Performance Elements and Standards* tab to view the performance elements and standards.
5. Select 'Show' link under the Details column to display the performance element and standard(s) or select 'Update' or 'View' button under the Action column to view.
6. After you have completed viewing a performance element and standard(s), select 'Return to Performance Elements' button. Continue step to view all performance element and standard(s).
7. Select 'Save and Continue' or 'Continue' button or *Step 4: Approvals and Acknowledgements* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

### **Request or Document Higher Level Reviewer Approval**

**NOTE:** The higher level reviewer approval process is optional. Check with your Component if higher level approval of the performance plan is required. If required:

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from Action column drop-down menu.

**NOTE:** The current status is 'Plan in Progress.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 3: Approvals and Acknowledgments* tab.
6. Select 'Start' button in Step 1: Rating Official - Request or Document Higher Level Review.
7. To request higher level review, select 'Option A - Transfer to the Higher Level Reviewer.'

**NOTE:** If you are both the rating official and the higher level reviewer, use Option B.

- Change the name of the higher level reviewer, if necessary.
  - Type an email message to higher level reviewer requesting review. The 'Spell Check' button is available if you wish to check the spelling of the text.
  - Select 'Transfer to Higher Level Reviewer' without or with email notification button.
8. To document higher level review, select 'Option B - Document the higher level review has taken place by entering the following information.'
    - Change the name of the higher level reviewer, if necessary.
    - Change Review Date using the calendar icon or enter date (DD-MMM-YYYY).
    - Select a Method of Review from the drop down arrow. If the method is Other, complete the 'Other Method' text field.
    - Select 'Save' button.
    - Certify that the printed copy of the appraisal form accurately presents the performance plan as seen by and approved by the higher level reviewer and the higher level reviewer has signed the appraisal form by selecting 'Yes' button.
  9. In *Step 3: Rating Official - Document Communication to Employee*, select 'Start' button or 'Logout' link in upper right hand corner to end session.

### **Request or Document Higher Level Reviewer Re-approval**

**NOTE:** Re-approval is required when updates are made to the approved performance elements and standards or additional performance elements and standards are added to an approved performance plan.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Approved.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 3: Performance Elements and Standards* tab to review the employee's performance elements and standards.
6. Select 'Show' link under the Details column to display the performance element and standard(s) or select 'Update' button under the Action column to make any desired changes.
7. Select *Step 5: Performance Elements and Standards Re-approvals* tab.  
In Step 1: Rating Official - Request or Document Higher Level Review (if required)



**NOTE:** If higher level reviewer review is not required, go to Step 3, select 'Start' button.

10. To request higher level review, select 'Option A - Transfer to the Higher Level Reviewer.'

**NOTE:** If you are both the rating official and the higher level reviewer, use Option B.

- Change the name of the higher level reviewer, if necessary.
- Type an email message to higher level reviewer requesting review. The 'Spell Check' button is available if you wish to check the spelling of the text.
- Select 'Transfer to Higher Level Reviewer' without or with email notification button.

**NOTE:** Current status is 'Plan Pending HLR Review.'

11. To document higher level review, select 'Option B - Document the higher level review has taken place by entering the following information.'
  - Change the name of the higher level reviewer, if necessary.
  - Change Review Date using the calendar icon or enter date (DD-*MMM*-YYYY).
  - Select a Method of Review from the drop down arrow. If the method is Other, complete the 'Other Method' text field.
  - Select 'Save' button.
  - Certify that the printed copy of the appraisal form accurately presents the performance plan as seen by and approved by the higher level reviewer and the higher level reviewer has signed the appraisal form by selecting 'Yes' button.
12. In Step 3: Rating Official - Document Communication to Employee, select 'Start' button or 'Logout' link in upper right hand corner to end session.

### **Document Communication to Employee**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Reviewed by HLR.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 4: Approvals and Acknowledgments* tab.
6. Select 'Start' button in Step 3: Rating Official - Document Communication to Employee.
7. Enter the following information:
  - Date the communication to the employee occurred in the 'Communication Date' field.
  - Select 'Communication Method' from drop-down menu. If the method is Other, complete the 'Other' text field.
8. Select 'Save and Transfer to Employee for Acknowledgment' button.

9. If desired, make changes to the notification email message to the employee and select 'Transfer to Employee' without or with email notification button to complete the transfer.
10. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Retrieve Performance Plan/Appraisal**

1. Begin at *MyPerformance Main Page*.
2. Select 'Retrieve' from the Action column drop-down menu.
3. Select 'Go' button.
4. The Action column will reflect 'Update' instead of View.
5. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Change Rating Official and Higher Level Reviewer**

1. Begin at *MyPerformance Main Page*.
2. Select 'Change RO and/or HLR' from the Action column drop-down menu.
3. Select 'Go' button.
4. Use the 'magnifying glass' icon or enter name to change the rating official and/or higher level reviewer.
5. Select 'Continue' button to continue with the process.
6. If desired, make changes to the notification email message to the rating official/higher level reviewer. If rating official needs to be changed, select 'Change Rating Official' with or without email notification button. If higher level reviewer needs to be changed, select 'Change Higher Level Reviewer' with or without email notification button.
7. Select 'OK' to confirm that the rating official/higher level reviewer has been changed. RO will be navigated to the *MyPerformance Main Page*.
8. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Transfer Performance Plan/Appraisal to Employee**

1. Begin at *MyPerformance Main Page*.
2. Select 'Transfer to Employee' from the Action column drop-down menu.
3. Select 'Go' button.
4. If desired, make changes to the notification email message to the employee indicating that you are transferring the performance plan. The 'Spell Check' button is available if you wish to check the spelling of the text.
5. Select 'Transfer to Employee' without or with email notification button at the top of the *Email Notification* page.

**NOTE:** Use this method of returning the plan/appraisal to the employee only when it needs to be returned and not part of the *Approvals and Acknowledgments* process.

6. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Document Employee Acknowledgment**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Step 4: Approvals and Acknowledgments* tab.
6. Select 'Start' button in Step 4: Rating Official - Document Employee Acknowledgment.
7. Select 'Unable to Sign', 'Refused', 'Other' or 'No System Access' from the drop down arrows for acknowledgment.
8. If Other, enter method in 'Other Method' text box.
9. Select 'calendar' icon or enter date (DD-MMM-YYYY).
10. Select 'Save' button.
11. Select 'Logout' link in upper right hand corner to end session.

### **Close Erroneous Performance Plan**

**NOTE:** If the plan status is 'Approved' or 'Modified,' this process can be used to close an erroneous performance plan. You must be the current owner of the performance plan.

1. Begin at *MyPerformance Main Page*.
2. Select 'Close' from the Action column drop-down menu.
3. Select 'Go' button.
4. A warning message is displayed, select 'Yes' button to continue the process.
5. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Delete Pending Performance Plan**

**NOTE:** If the plan status is 'Pending,' this process can be used to remove an erroneous performance plan from the database. You must be the current owner of the performance plan. Use caution when using this process as the action cannot be undone.

1. Begin at *MyPerformance Main Page*.
2. Select 'Delete' from the Action column drop-down menu.
3. Select 'Go' button.
4. A warning message is displayed, select 'Yes' button to continue the process.
5. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## Track Progress of Performance Plan/Appraisal during the Performance Cycle

1. Begin at *MyPerformance Main Page*.
2. Select 'Track Progress' from the Action column drop-down menu.
3. Select 'Go' button.
4. Review the status of your employee's performance plan.
5. Select 'Print' button to print.
6. Select 'Go Back' button to continue or 'Logout' link in the upper right hand corner to end session.

## Progress Review

### Create Progress Review

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Approved.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select Progress Reviews tab.
6. Select 'Create Progress Review' button.
7. Review your employee's performance elements and standards.
8. Select 'Go Back to Progress Reviews' button or 'Logout' link in upper right hand corner to end session.

### Request or Document Higher Level Reviewer Approval

**NOTE:** The higher level reviewer approval process is optional. Check with your Component if higher level approval of the performance plan is required. If required:

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from Action column drop-down menu.

**NOTE:** The current status is 'Progress Review in Progress.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Progress Reviews* tab.
6. Select 'Update' button under the Action column.
7. Select Approvals and Acknowledgments tab.
8. Select 'Start' button in Step 1: Rating Official - Request or Document Higher Level Review.
9. To request higher level review, select 'Option A - Transfer to the Higher Level Reviewer.'

**NOTE:** If you are both the rating official and the higher level reviewer, use Option B.

- Change the name of the higher level reviewer, if necessary.
  - Type an email message to higher level reviewer requesting review. The ‘Spell Check’ button is available if you wish to check the spelling of the text.
  - Select ‘Transfer to Higher Level Reviewer’ without or with email notification button.
10. To document higher level review, select ‘Option B - Document the higher level review has taken place by entering the following information.’
- Change the name of the higher level reviewer, if necessary.
  - Change Review Date using the calendar icon or enter date (DD-MMM-YYYY).
  - Select a Method of Review from the drop down arrow. If the method is Other, complete the ‘Other Method’ text field.
  - Select ‘Save’ button.
  - Certify that the printed copy of the appraisal form accurately presents the performance plan as seen by and approved by the higher level reviewer and the higher level reviewer has signed the appraisal form by selecting ‘Yes’ button.
11. In *Step 3: Rating Official - Document Communication to Employee*, select ‘Start’ button or ‘Logout’ link in upper right hand corner to end session.

### **Document Communication to Employee**

1. Begin at *MyPerformance Main Page*.
2. Select ‘Update’ from Action column drop-down menu.

**NOTE:** The current status is ‘Progress Review Approved by HLR or Progress Review in Progress.’

3. Select ‘Go’ button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select Progress Reviews tab to list the employee’s Progress Reviews.
6. Select ‘Update’ button for the selected Progress Review.
7. Select Approvals and Acknowledgments tab.
8. Select ‘Start’ button in *Step 3: Rating Official - Document Communication to Employee*.
9. Enter the date the communication to the employee occurred in the ‘Communication Date’ field.
10. Select ‘Communication Method’ from drop-down menu. If the method is other, complete the ‘Other’ text field.
11. Select ‘Save and Transfer to Employee for Acknowledgment’ button.
12. If desired, make changes to the notification email message to the employee and select ‘Transfer to Employee’ without or with email notification button to complete the transfer.
13. Select another employee’s plan/appraisal for action from *MyPerformance Main Page* or ‘Logout’ link in upper right hand corner to end session.

## Final Performance Appraisal

### Enter Narrative and Ratings

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Completed' or 'Plan Approved.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Annual Appraisal* tab to continue.
6. Select *Assessments and Ratings* tab to list the employee's performance elements and standards.
7. Select 'radio button' next to each performance element to display the performance element and standard(s) and the employee input.
8. Enter a narrative into the 'Rating Official box. You may copy and paste this data into the appropriate box from MS Word. The 'Spell Check' button is available if you wish to check the spelling of the text.
9. Recommend a performance element rating.
10. Select 'Go to Next Performance Element' button for each performance element and standard(s).
11. Select 'Go Back to Top of Page' when all narratives and ratings have been entered.
12. Select *Rating of Record* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

### Update Rating of Record

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Completed' or 'Plan Approved.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select '*Annual Appraisal*' to continue.
6. Select *Rating of Record* tab.
7. If you need to change the assigned rating to a performance element, select 'Rating' drop-down arrow and select appropriate rating. If changes are made, the average score and rating of record will re-calculate.
8. Select *Approvals and Acknowledgments* tab to continue with the process or 'Logout' link in upper right hand corner to end session.

### Request or Document Higher Level Reviewer Approval

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Completed' or 'Plan Approved.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Annual Appraisal* tab to continue.
6. Select *Approvals and Acknowledgments* tab.
7. In Step 1: Rating Official - Request or Document Higher Level Review, select 'Start' button.
12. To request higher level review, select 'Option A - Transfer to the Higher Level Reviewer.'

**NOTE:** If you are both the rating official and the higher level reviewer, use Option B.

- Change the name of the higher level reviewer, if necessary.
  - Type an email message to higher level reviewer requesting review. The 'Spell Check' button is available if you wish to check the spelling of the text.
  - Select 'Transfer to Higher Level Reviewer' without or with email notification button.
13. To document higher level review, select 'Option B - Document the higher level review has taken place by entering the following information.'
    - Change the name of the higher level reviewer, if necessary.
    - Change Review Date using the calendar icon or enter date (DD-*MMM*-YYYY).
    - Select a Method of Review from the drop down arrow. If the method is Other, complete the 'Other Method' text field.
    - Select 'Save' button.
    - Certify that the printed copy of the appraisal form accurately presents the performance plan as seen by and approved by the higher level reviewer and the higher level reviewer has signed the appraisal form by selecting 'Yes' button.
  14. In Step 3: Rating Official - Document Communication to Employee, select 'Start' button or 'Logout' link in upper right hand corner to end session.

### **Document Communication to Employee**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Annual Appraisal* tab to continue.
6. Select *Approvals and Acknowledgments* tab.
7. Select 'Start' button in Step 3: Rating Official - Document Communication to the Employee.
8. Enter the date the communication to the employee occurred in the 'Communication Date' field.
9. Select 'Communication Method' from the drop-down menu. If the method is Other, complete the 'Other' text field.
10. Change the name of the rating official, if necessary.
11. Select 'Save' button.

12. Select 'Yes' button at the confirmation message. The appraisal will be removed from your plan/appraisals in progress and a copy will be placed under the 'Completed Plans/Appraisal' found on the *MyPerformance Main Page*.
13. Select 'Print Appraisal Form' button if you wish to print the form prior to exiting the annual appraisal.
14. Select 'Return to Main Page' button to start a new process or 'Logout' link in upper right hand corner to end session.

## Narrative Statements

### Create Narrative Statement

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Narrative Statements* tab.
6. Select 'Create Narrative Statement' button. Select 'Yes' button to continue after reviewing information message.
7. Select 'Go Back to Narrative Statements' button or 'Logout' link in upper right hand corner to end session.

### Enter Narrative with Employee Input

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Narrative Statement in Progress.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Narrative Statements* tab to list the employee's narrative statements.
6. Select 'Update' button from the Action column.
7. Select *Assessments* tab to list the employee's performance elements and standards.
8. Select 'radio button' next to each performance elements to display the performance element and standard(s) and employee input.
9. Enter narrative into the 'Rating Official' box. You may copy and paste this data into the appropriate box from MS Word. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Go to Next Performance Element' button for each performance element and standard(s).
11. Select 'Go Back to Top of Page' when all narratives been entered.
12. Select 'Go Back to Narrative Statements' button at the top of the screen or 'Logout' link in upper right hand corner to end session.



## Document Communication to Employee

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from Action column drop-down menu.

**NOTE:** The current status is 'Narrative Statement is Pending.'

3. Select 'Go' button
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Narrative Statements* tab to update the employee's narrative statements.
6. Select 'Update' button under Action column.
7. Select *Communication and Acknowledgments* tab.
8. Select 'Start' button in Step 1: Rating Official - Document Communication to Employee.
9. Enter the date the communication to the employee occurred in the 'Communication Date' field.
10. Select 'Communication Method' from drop-down menu. If the method is Other, complete the 'Other' text field.
11. Select 'Save and Transfer to Employee for Acknowledgment' button.
12. If desired, make changes to the notification email message to the employee and select 'Transfer to Employee' without or with email notification button to complete the transfer. RO is navigated to *MyPerformance Main Page*.
13. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand to end session.

## Section 3 - Higher Level Reviewer

### Performance Plan

#### Choose an Action

5. Begin at *MyPerformance Main Page*.
6. Select 'Update' or 'View' from the Action column drop-down menu.
7. Select 'Go' button.

**NOTE:** Choose an Action is available on every tab in the DoD Performance Management Appraisal Program.

8. Select 'Choose an Action drop down arrow, select the action and select 'Go' button to perform different actions throughout the performance cycle.

**NOTE:** Selection from Choose an Action depends on if you have Update or View capability for your employee's performance plan/appraisal.

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

## Approve Performance Plan

1. Login to MyBiz+ at <https://compo.dcpds.cpms.osd.mil/>.
2. Select 'Performance Management and Appraisal' from Manager Functions under Key Services.
3. On *MyPerformance Main Page*, select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Pending HLR Review.'

4. Select 'Go' button.
5. Review Supervisory Commitment Statement and select Acknowledge button.
6. Select any of the tabs to review information about the performance plan: *Step 1: Plan Details, Step 2: Mission Goals, or Step 3: Performance Elements and Standards tab.*
7. Select *Step 3: Performance Elements and Standards* tab and select View button under Action column to review employee's performance elements and standards. Select Go Back to Performance Elements button to view another performance element and standard(s).
8. Select '*Step 4: Approvals and Acknowledgments* tab.
9. In Step 2: Higher Level Reviewer - Review, select 'Approve' button.
10. Enter an email message to the rating official indicating your approval. The 'Spell Check' button is available if you wish to check the spelling of the text.
11. Select 'Approve and Notify Rating Official' without or by email button.
12. You will receive a warning - Do you wish to approve the Performance Plan Elements for (Employee Name)? Select 'No' or 'Yes' button to continue. You are navigated to *MyPerformance Main Page*.
13. Confirmation message received that the appraisal has been submitted to the rating official.
14. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## Return Performance Plan for Change to Rating Official

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select any of the tabs to review information about the performance plan: *Step 1: Plan Details, Step 2: Mission Goals, or Step 3: Performance Elements and Standards tab.*
6. Select *Step 3: Performance Elements and Standards* tab and select 'View' button under Action column to review employee's performance elements and standards. Select 'Go Back to Performance Elements' button to view another performance element and standard(s).
7. Select *Step 4: Approvals and Acknowledgments* tab.
8. In Step 2: Higher Level Reviewer - Review, select 'Return for Change' button.

9. Enter an email message to the rating official indicating the reason for returning. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Return to Rating Official' without or by email button.
11. You will receive a warning - You have chosen to return the appraisal to the rating official for correction. Do you wish to continue? Select 'No' or 'Yes' button to continue. You are navigated to *MyPerformance Main Page*.
12. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## Performance Plan Re-approval

### Re-approve Performance Plan

**NOTE:** Re-approval is required when updates are made to the approved performance elements and standards or additional performance elements and standards are added to an approved performance plan.

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' button from the Action column drop-down menu.

**NOTE:** The current status is 'Plan Pending HLR Review.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select any of the tabs to review information about the performance plan: *Step 1: Plan Details*, *Step 2: Mission Goals*, or *Step 3: Performance Elements and Standards tab*.
6. Select *Step 3: Performance Elements and Standards* tab and select View button under Action column to review employee's pending performance elements and standards. Select Go Back to Performance Elements button.
7. Select *Step 5: Performance Elements and Standards Re-approvals* tab.
8. In Step 2: Higher Level Reviewer - Review, select 'Approve' button.
9. Enter an email message to the rating official indicating your approval. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Approve and Notify Rating Official' without or by email button.
11. You will receive a warning - Do you wish to approve the Performance Plan Elements for (Employee Name)? Select 'No' or 'Yes' to continue. You are navigated to *MyPerformance Main Page*.
12. Confirmation message received that the appraisal has been submitted to the rating official.
13. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## Return Re-approve Performance Plan for Change to Rating Official

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.
3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select any of the tabs to review information about the performance plan: *Step 1: Plan Details, Step 2: Mission Goals, or Step 3: Performance Elements and Standards tab*.
6. Select *Step 3: Performance Elements and Standards* tab and select 'View' button under Action column to review employee's pending performance elements and standards. Select 'Go Back to Performance Elements' button.
7. Select *Step 5: Performance Elements and Standards Re-approvals* tab.
8. In Step 2: Higher Level Reviewer - Review, select 'Return for Change' button.
9. Enter an email message to the rating official indicating the reason for returning. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Return to Rating Official' without or by email button.
11. You will receive a warning - You have chosen to return the appraisal to the rating official for correction. Do you wish to continue? Select 'No' or 'Yes' button to continue. You are navigated to *MyPerformance Main Page*.
12. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## Progress Review

### Approve Progress Review

**NOTE:** The higher level reviewer approval process is optional. Check with your Component if higher level approval of the Progress Review is required. If required:

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Pending HLR Approval.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Progress Reviews* tab to view the employee's progress review.
6. Select 'Update' button under Action column.
7. Select *Approvals and Acknowledgments* tab.
8. In Step 2: Higher Level Reviewer - Review (if required), select 'Approve' button.
9. Enter an email message to the rating official indicating your approval. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Approve and Notify Rating Official' without or by email button.

11. You will receive a 'Warning' - Do you wish to approve the Progress Review for (Employee Name)? Select 'No' or 'Yes' to continue. You are navigated to *MyPerformance Main Page*.
12. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### **Return Progress Review for Change to Rating Official**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Progress Review Pending HLR Approval.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Progress Reviews* tab to view the employee's progress review.
6. Select 'Update' button under the Action column.
7. Select *Approvals and Acknowledgments* tab.
8. In Step 2: Higher Level Reviewer - Review (if required), select 'Return for Change' button.
9. Enter an email message to the rating official indicating your reason for returning progress review. The 'Spell Check' button is available if you wish to check the spelling of the text.
10. Select 'Return to Rating Official' without or with email notification button.
11. You will receive a warning - You have chosen to return the appraisal to the rating official for correction. Do you wish to continue? Select 'No' or 'Yes' button to continue. You are navigated to *MyPerformance Main Page*.
12. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

## **Final Performance Appraisal**

### **Review Narrative and Recommended Rating of Record**

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Appraisal Pending HLR Approval.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Annual Appraisals* tab to access the *Assessments and Ratings, Rating of Record and Approvals and Acknowledgments* tabs.
6. Select *Assessments and Ratings* tab to view the performance elements and standards and ratings.

7. Select radio button next to each performance element and standard(s) to view the performance element and standard(s), employee input, and rating official narrative and recommended ratings.
8. Once all elements have been viewed, select *Rating of Record* tab.
9. The average score and rating of record will be available in Rating of Record.
10. Select 'Return to Main Page' button or 'Logout' link in upper right hand corner to end session.

### Finalize Ratings of Annual Appraisal

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status is 'Appraisal Pending HLR Approval'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.
5. Select *Annual Appraisal* tab to access the *Assessments and Ratings, Rating of Record and Approvals and Acknowledgments* tabs.
6. Select *Assessments and Ratings* tab to see the performance elements and standards ratings.
7. Select radio button next to each performance element and standard(s) to view the performance element and standard(s), employee input, and rating official narrative and recommended ratings.
8. Once all elements have been viewed, select *Rating of Record* tab.
9. The average score and rating of record will be available in *Rating of Record* tab.
10. Select *Approvals and Acknowledgments* tab.
11. In Step 2: Higher Level Reviewer - Review, select 'Finalize Ratings' button.
12. Enter an email message to the rating official(s) indicating approval. The 'Spell Check' button is available if you wish to check the spelling of the text.
13. Select 'Approve and Notify Rating Official' without or by email button.
14. You will receive a 'Warning' - Do you wish to approve the Annual Appraisal for (Employee Name)? Select 'No' or 'Yes' to continue. You are navigated to *MyPerformance Main Page*.
15. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.

### Return Annual Appraisal for Change to Rating Official

1. Begin at *MyPerformance Main Page*.
2. Select 'Update' from the Action column drop-down menu.

**NOTE:** The current status' is 'Appraisal Pending HLR Approval.'

3. Select 'Go' button.
4. Review Supervisory Commitment Statement and select Acknowledge button.

5. Select *Annual Appraisals* tab to access the *Assessments and Ratings*, *Rating of Record and Approvals and Acknowledgments* tabs.
6. Select *Assessments and Ratings* tab to view the performance elements and standards and narrative.
7. Select 'radio button' next to each performance element and standard(s) to view the performance element and standard(s), employee input, and rating official narrative and recommended ratings.
8. Once all elements have been viewed, select *Rating of Record* tab.
9. The average score and rating of record will be available in *Rating of Record*.
10. Select *Approvals and Acknowledgments* tab.
11. In Step 2: Higher Level Reviewer - Review, select 'Return for Change' button.
12. Enter an email message to the rating official(s) indicating the return of appraisal. The 'Spell Check' button is available if you wish to check the spelling of the text.
13. Select 'Return to Rating Official' without and with email notification button.
14. You will receive a warning - You have chosen to return the appraisal to the rating official for correction. Do you wish to continue? Select 'No' or 'Yes' button to continue. You are navigated to *MyPerformance Main Page*.
15. Select another employee's plan/appraisal for action from *MyPerformance Main Page* or 'Logout' link in upper right hand corner to end session.