

MyPerformance

(DoD Performance Management and Appraisal Program)

Employee User Guide

March 7, 2016





Table of Contents

Introduction	3
Background	3
How the Guide Is Structured	4
Transfer, Sharing, and Ownership of Appraisal Records	4
Cutting, Copying and Pasting	5
Performance Management Appraisal Procedures –What Employees Need to Know	6
Getting Started - About DoD Performance Management Appraisal Tool	7
Accessing the DoD Performance Management Appraisal Tool	7
DCPDS Portal	
Employee Access to MyPerformance	10
MyPerformance Main Page	11
Provide Guest Feedback	11
MyJournal	12
Table 1 – MyPerformance Main Page - Column Headings and Description	13
Performance Plans	15
Creating a Performance Plan (Employee)	15
Table 2 – Create Performance Plan page - Setup Details fields and descriptions	17
Table 3 - Performance Element and Standards Fields and Descriptions	20
Table 4 – Decision Table for Performance Elements	20
Editing the Performance Plan (Employee)	24
Table 5 – Decision Table for use when editing Performance Elements and Standards	29
Acknowledging the Performance Plan (Employee)	32
Completed Plans/Appraisals Section	37





Introduction

Purpose	The purpose of this guide is to provide employees, step-by-step instructions on how to create a performance plan in MyPerformance.
	MyPerformance helps employees manage performance. The tool streamlines and automates performance management processes and documentation requirements to make it easier and more efficient to track and monitor performance.
Who Should Use This Guide?	This user guide is for employees.
Background	
Who to Call For Help?	If you have a question regarding your login, access to other tools within MyBiz+ pages, or system functionality, please contact your Component Help Desk. The Component Help Desk list is located at the bottom of the DCPDS Portal page at <u>https://compo.dcpds.cpms.osd.mil</u> .
Navigation Tips	Use Control and mouse click (Ctrl + Click) on the hyperlinked words to view associated screenshots or move throughout the document. Use the keyboard shortcut alt and left arrow (Alt + left arrow) to go back to where you were.
	If you need to know how to perform a specific task or procedure, use the table of contents herein to locate the information.





How the Guide Is Structured

This guide helps you get started with the tool and serves as a reference whenever you need assistance with a particular function. There are two major sections in this guide:

Performance Management Appraisal Procedures for Employees

• Shows employees how to work in the tool. Work is divided into tasks that are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Performance Management Appraisal Procedures for Rating Officials

• Shows rating officials how to work in the tool. Work is divided into tasks, which are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Transfer, Sharing, and Ownership of Appraisal Records

MyPerformance allows employees and rating officials to transfer performance plans back and forth. Both roles can review the performance plan online, make changes to it, and then transfer the performance plan back. Employees and rating officials can share the performance plan as often as necessary during a single appraisal cycle.

Either the employee or the rating official "owns" the performance plan at any given time. Employees transfer ownership by transferring performance plans to rating officials, and rating officials transfer ownership back to employees in the same way. When the employee has ownership of the performance plan, the rating official may retrieve it in order to complete the plan or make changes.

When the employee owns the performance plan, the rating official:

- Cannot update the performance plan unless the rating official retrieves it.
- Can see all sections of the performance plan. Any changes the employee makes to an in-progress input or overall feedback are not visible to the rating official until the employee transfers the appraisal record again.

When the rating official owns the appraisal record, the employee:

- Cannot update the performance plan.
- Can view the performance plan for information only up to the last sharing point. Any changes the rating official makes to an in-progress performance plan after resuming ownership are not visible to the employee until the rating official transfers the appraisal record again.





Cutting, Copying and Pasting

You can cut or copy and paste from another document. Be aware that special characters may appear incorrectly as you paste your text into the field. You may not see the characters the way they will actually appear (that is, incorrectly) in the system until you save your changes for that page. Take the time to review the text closely after you have saved it, make any changes and save again.





Performance Management Appraisal Procedures –What Employees Need to Know

MyPerformance stores, organizes, and routes information regarding all aspects of the performance management process, including performance plans, progress reviews, and final performance appraisal discussions. This section focuses on the employee's use of the system and explains how to use *MyPerformance* to enter and edit your own performance plan.

At the beginning of the rating cycle (normally April 1 of each year), you or your rating official (usually your immediate supervisor) initiate a new performance plan.

Performance plans include a maximum of ten performance elements and related performance standards. All elements are critical and each performance plan must have at least one element.

There are two approaches to creating a performance plan:

- Your rating official notifies you to create the plan, and you create it.
- Your rating official creates the plan.

You and your rating official should communicate about your performance expectations in creating and finalizing your performance plan. In order to draft your performance plan, you need certain information such as the appraisal period start, end, and effective dates and your relevant organizational mission/strategic goals. If you do not know this information, check with your rating official before you begin.





Getting Started - About DoD Performance Management Appraisal Tool

If you are new to the MyBiz+ self-service tool, pages 6 through 11 provide screen shots and descriptions of the information on the screens to help in familiarizing you with the tool. However, should you wish to get started right away, go directly to page 12 and start with 'Creating a Performance Plan (Employee).'

Accessing the DoD Performance Management Appraisal Tool

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





DCPDS Portal

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

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



Figure 1 - DCPDS Portal Login Page - Certificate Selection





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

Privacy /	Act Statement
ersonal information plea Authorities: 5 U.S.C. Ch olumes 1100 and 1401; Principal Purposes: To information. Routine Uses: None. Th	de to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your se contact your local Human Resources Office. apters 11, 13, 29, 31, 33, 41, 43, 51, 53, 56, 61, 63, 72, 75, 83, and 99, 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400 25, 20 CFR 1614 601; and E.O.9307. allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal to DO 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system. owever, failure to provide or update your information may require manual HR processing or the absence of some information.
	Accessibility/Section 508 Privacy and Security Policy System Help Desk Contacts





Employee Access to MyPerformance

From the *MyBiz*+ home page, select *MyPerformance* under **Key Services**.

MyBiz+		Othe	r DCPDS App	olications - 🔺 Favorites - Customer Support - 😡 H	elp - Logout
Your Personnel Action for the 2016 General	I Pay Adjustment is			Notifications	
available! You can go to the Personal or Po			Read / Unread	Title	Start Date
then select SF50 or NPA Personnel Actions	2000 - 100 -	0		A General Pay Adjustment action has been processed on your record. NPA Action is processed in DCPDS and is expected to be available in eOPF within the next 48 hours.	10-Jan-2016
		-		W4 Information Review	23-Dec-2015
Home				You have 1 unread notifications.	*****
* Provide Feedback					
## Key Services	Professional Development			Other Responsibilities/Applications	Manage My Views 🦻
Manage Key Services 🗭	Education: Human Resources Management/Person Post-Master's - (1999)	nel Administration, Gener	ral (521001)	Responsibilities: READONLY PERSONNELIST	
Request Employment Verification	Training:	COCNITIAL O 402 See 20	15 . 04 .040		
Civilian Career Report	ADOBE CAPTIVATE 8: BEYOND THE E -2015)	53ENTINES (03-Sep-20	10 - 04-560		
Update Contact Information	Certification/Licenses:				

Figure 3 - *MyBiz*+ Home Page

You are now on the *MyPerformance Main Page* where you can create, update, and view your performance plan/appraisal.

						MARKET IN	F My BO ICE M	yPerformance Logout Hel	Diamon
tyPerformance Main Page	Provide Guer	st Feedback My Journal						Maladissission	
Employee									
			MyPerfo	rmance Ma	in Page				
								Ne	ed Help?
	the second	and the second second second second second			De NOT est	and the day			
		Ig: This application is designed Unauthorized release of classi				r classified i	information in	this	
	-	Children and a second second	and a second sec	And a second sec	und the second second				
		I view your Performance Plans; view ar Ns page.	xd print part or an entire plar	n after it is created; and	track the status of a plan. You o	an also search	for completed plar	ns by selecting the "Show C	ompleted
Plans/Appraisals' link located a	at the bottom of th			n after it is created; and	track the status of a plan. You o	an also search	for completed plar	ns by selecting the 'Show C	ompleted
Plans/Appraisals' link located a	at the bottom of th : To Type'	his page.	ove:	n after it is created; and	track the status of a plan. You o	an also search	for completed plar	ns by selecting the 'Show C	ompleted
Nans/Appraisals' link located a To create a Performance Plan: Select 'Choose a Plan T Select Appraisal Plan T Select the 'Go' button	at the bottom of th : To Type' (ype	 Nespage. complete other actions described ab Select an option from the Action 	ove:	n after it is created; and	track the status of a plan. You e	an also search	for completed play	ns by selecting the 'Show C	ompleted
Plans/Appraisals' link located a To create a Performance Plan: Select 'Choose a Plan T Select Appraisal Plan T Select the 'Go' button	at the bottom of th : To Type ar with the column	Is page. o complete other actions described ab • Select an option from the Action • Select the 'Go' button Ins, select the 'Need Help?' link.	ove:	n after it is created; and	track the status of a plan. You o	an also search	for completed plar	es by selecting the 'Show C	ompleted
Plann/Appraisals' link located a To create a Performance Plan: Select 'Choose a Plan T Select Appraisal Plan T Select the 'Go' button Important: To become familia	at the bottom of th : To Type ar with the column	Is page. o complete other actions described ab • Select an option from the Action • Select the 'Go' button Ins, select the 'Need Help?' link.	ove:	n after it is created; and	track the status of a plan. You o	an also search		es by selecting the 'Show C te New Plan	ompleted
Plann/Appraisals' link located a To create a Performance Plan: Select 'Choose a Plan T Select Appraisal Plan T Select the 'Go' button Important: To become familia	at the bottom of th : To Type ar with the column	Is page. o complete other actions described ab • Select an option from the Action • Select the 'Go' button Ins, select the 'Need Help?' link.	ove:	n after it is created; and	track the status of a plan. You o			te New Plan	ompleted
Plann/Appraisals' link located a To create a Performance Plan: Select 'Choose a Plan T Select Appraisal Plan T Select the 'Go' button Important: To become familia	at the bottom of th : To Type ar with the column	Is page. o complete other actions described ab • Select an option from the Action • Select the 'Go' button Ins, select the 'Need Help?' link.	ove:	n after it is created; and	track the status of a plan. You o		Creat	te New Plan	

Figure 4 - MyPerformance Main Page





MyPerformance Main Page

The *MyPerformance Main Page* tab is the default page for both employees and rating officials. From this main page you can create, update, view your performance plan/appraisal, and search for completed plans/appraisals. Two additional tabs are available from the main page:

- 1) Provide Guest Feedback tab used if you are identified to provide performance input.
- 2) MyJournal tab is for employees only to keep track of your performance accomplishments.

Provide Guest Feedback

The *Provide Guest Feedback* tab is if you have been invited to provide feedback as a guest participant for employee(s). Your role in the appraisal may be as a guest rater or guest reviewer.

MyPerformance					
MyPerformance Main Page Provide Guest Feedback	My Journal		MyBiz+ ICE My Biz IC	CE MyPerformance Log	out Help Diagnostics
Appraisals as Guest Participant					
If an employee name is reflected on the tal be as a guest rater or guest reviewer.	le below, it means you have been invited to	provide feedback as a guest participant fi	or the employee(s) listed. Yo	our role in the appraisal m	<u>Need Help?</u> nay
and standard ratings at any s o Defense Civilian Intelligence the performance appraisal. T o National Guard (Title 32) can appraisal. They cannot view • Guest Reviewer can provide ove	all comments at any stage of the performance aisal process is complete. To display specific a	ot view others' assessments, back and ratings on individual performanc b objectives and provide recommended j a appraisal. They cannot view others' ass	e objectives and performanc ob objective ratings at any s essments.	ce elements at any stage stage of the performance	of
Plans/Appraisals for Feedback					
Records Displayed 10 Employee Name Appraisal Date Participatio	Type Participation Status	Participation Status Date	Date Completed	Rating Official	Type Action
No results found.	Participation Status	Participation Status Date	Date Completed	Racing Official	Type Action
MyPerformance Ma	in Page Provide Guest Feedback My Journ	al MyBiz+ ICE My Biz ICE MyPerform	nance Logout Help Diagn	nostics	

Figure 5- Provide Guest Feedback Page





MyJournal

The *MyJournal* tab is available for employees to track job accomplishments during the appraisal period to assist in developing employee input at the end of the appraisal cycle. Only employees can see their *MyJournal* entries.

MyPerformance	
MyBiz+ ICE My Biz IG	CE MyPerformance Logout Diagnostics
MyPerformance Main Page Provide Guest Feedback My Journal	
My Journal	
	Purge All Save Printable Page
	Need Help?
TIP: The employee journal will assist you in tracking your job accomplishments during the appraisal period. Recording your accomplishments as they occur wil time you are requested to provide your self-assessment. You will be able to copy and paste information from this tab into other assessment areas. Your journa only be accessible to you.	l assist you at the I information will
 As a reminder, you can only paste 8000 characters into the individual job objective assessment area. 	
Select the "Purge All" button to remove all information contained in your employee journal.	
Enter job accomplishments here. You have a limit of 8000 characters.	
(Umit to 8000 charaders) Spell Check Counter 43	Purge All Save Printable Page
MyPerformance Main Page Provide Guest Feedback My Journal MyBiz+ ICE My Biz ICE MyPerformance Logout Diagnostics	

Figure 6 - MyJournal Page

MyPerfo	rmance									
MyPerformance Main Page Provi	de Guest Feedback My Journal							MyBiz+ ICE My Biz ICE MyPer	formance Logout Help Diagnostic:	
Employee										
			MyPerf	ormance Main P	Page					
									Need Help?	
	Warning: This application is de classified information is a violati			formation only. Do NOT e	enter classified in	formation in	this system. Una	uthorized release of		
From the Main Page, you can create, upd	ate and view your Performance Plans; view ar	d print part or an entire plan after	it is created; and track t	he status of a plan. You can also s	earch for completed p	lans by selecting	the 'Show Completed	Plans/Appraisals' link located at th	e bottom of this page.	
To create a Performance Plan:	To complete other actions described above									
 Select 'Choose a Plan Type' Select Appraisal Plan Type Select the 'Go' button 	 Select an option from the Action col Select the 'Go' button 	umn								
Important: To become familiar with the	columns, select the 'Need Help?' link.									
Appraisals of One, Employee										
								Create New Pla Choose a Plan Type	n • Go	
Records Displayed 10 🔻										
Employee Name Current C	wner Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type Pl	lan Status	Current Status	Action		
One, Employee Rater, The	Rater, The	2017	53	29-Apr-2016	DoD Ap	pproved	Plan Approved	View	▼ Go	
Select the link to search for completed plan Show Completed Plans/Appraisals	5.	MyPerformance Main Page Pro	vide Guest Feedback N	My Journal MyBiz+ ICE My Biz	ICE MyPerformance	ELogout Help	Diagnostics			

Figure 7 - MyPerformance Main Page - Column Area





Table 1 – MyPerformance Main Page - Column Headings and Description

The table below provides a description of each column heading under the Appraisal bar on the *MyPerformance Main Page* screen.

Column Headings	Description
Employee Name	Name
Current Owner	Person who has update capability to the performance plan. The plan may be
	owned by employee, rating official or higher level reviewer
Rating Official Name	Name of your rating official
Appraisal Year	Performance appraisal cycle year
Appraisal ID	An automated number assigned to a plan when created
Plan Approval Date	Date performance plan was approved
Туре	Identifies the three types of plans that may be created:
	• DoD – DoD Performance Management Appraisal Program (DoD employees will select this option.)
	 DCIPS - Defense Civilian Intelligence Personnel System NG – National Guard (Title 32)
Plan Status	Indicates the status of your performance plan:
	• Approved – Performance plan has been approved and communicated to the employee
	• Modified – An approved performance plan has been changed and the changes have not been approved
	 Pending – Performance plan has been initiated and saved but not approved
Current Status	 Indicates progression through the steps of the performance management process Plan in Progress – Performance plan has been started but not approved or original performance plan was approved and performance elements and standards have been modified but not reapproved Plan Approved – Performance plan has been approved (or modified performance elements and standards have been reapproved) Progress Review in Process – Progress review has been created but not approved Progress Review Completed – Progress review has been approved by rating official and acknowledged by employee Narrative Statement in Progress – Narrative statement has been started but not approved Narrative Statement Completed – Narrative statement has been created and transferred to rating official but not approved



NEW BEGINNINGS

Action	You are the current owner of the performance plan/appraisal Action
	Update 🔻
	Update
	Delete
	Transfer to Rating Official
	Reports/Forms
	Change RO and/or HLR Track Progress
	You are not the current owner of the performance plan/appraisal
	Action
	View
	View
	Retrieve
	Reports/Forms
	Track Progress
	Available actions are determined by ownership and status
	• Update – Current owner and allows you to update plan/appraisal
	• Delete – You can only delete a pending plan that you created and has not been transferred to the rating official
	• Transfer to Rating Official – Routes plan/appraisal to rating official
	• Reports/Forms – To print or save reports and/or forms
	• Change RO and/or HLR – Change current Rating Official or Higher
	Level Reviewer for plan/appraisal
	• Track Progress – Displays status of your performance plan throughout the performance cycle
	• View – Only allows you to view performance plans
	• Retrieve – If the performance plan has not been opened by the rating
	official, you can retrieve it from rating official





Performance Plans

Creating a Performance Plan (Employee)

Follow these steps to create a performance plan.

1. On the *MyPerformance Main Page*, from the *Create New Plan* drop-down menu, select DoD Performance Management Appraisal Program. (See Figure 8 – *MyPerformance Main Page*) Select the **Go** button to display the *Create Performance Plan* page.

MyPerformance Main Page	Provide Guest Feedback	My Journal				
Employee						
		MyPer	formance Main	Page		
		_		_	Need	Help?
		ion is designed for sensitive em. Unauthorized release of				
From the Main Page, you can cre Completed Plans/Appraisals' link l			r an entire plan after it is created;	and track the status of a plan. You	can also search for completed plans by selecting	g the 'Show
To create a Performance Plan:	To complete other	ctions described above:				
 Select 'Choose a Plan Typ Select Appraisal Plan Typ Select the 'Go' button 		tion from the Action column to' button				
Important: To become familiar	with the columns, select the 'Ne	ad Help?' link.				
Appraisals of One, Employ	e					
				Choose	Create New Plan a Plan Type a Plan Type	Go
Records Displayed 10 🔻				Defense (ormance Management Appraisal Program Divilian Intelligence Personnel System	
Employee Name Current (wner Rating Official Na	e Appraisal Year Apprais	sal ID Plan Approval Date	Type Plan Status National C		0
						Go
Select the link to search for compl <u>Show Completed Plans/Apprai</u>						
	MyPerformance N	ain Page Provide Guest Feedback	My Journal MyBiz+ ICE My Bi	: ICE MyPerformance Logout I	Help Diagnostics	
		Figure 8 - <i>N</i>	NyPerforman	ce Main Page		

2. Review the data in Setup Details area identified in Figure 9 below, and make any necessary changes to the default values. The data is auto-populated, but you can override an entry by using the drop-down list or by manually entering data to make changes. The asterisk (*) on the screen indicates that the field is required.



NEW BEGINNINGS

reate Performance Plan		
		Cancel and <u>Return to Main Page</u>
		Need Hel
Employee Information		
Employee Name One, Employee		
3 Show Employee Details		
Setup Details		
* Indicates required field		
Indicates required field		Build New Plan
		Build New Plan
	Annual Appraisal - DoD 🔻	
TIP The Appraisal Period Start Date represents the start of the employee's p	erformance evaluation period under this plan. Please review and change this date, if necessary.	
* Appraisal Period Start Date 0	1-Apr-2016 🔢	
* Appraisal Period End Date 3	1-Mar-2017	
Appraisal Effective Date 0	1-Jun-2017 📓	
* Rating Official Name R	ater, The 🚽 🔍	
* Higher Level Reviewer Name R	eviewer, Higher Level 🔍	
	MyBig+ ICE My Big ICE MyPerformance FAQ Looput	

Figure 9 - Create Performance Plan





Table 2 – Create Performance Plan page - Setup Details fields and descriptionsThis table provides a description of each of the Setup Details area fields.

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

3. Select the **Build New Plan** button to go to the *Plan > Plan Details* page.

Create Performance Plan	Cancel and <u>Return</u> to Main Page
	Need Help?
Employee Information	
Employee Name One, Employee	
Show Employee Details	
Setup Details	
* Indicates required field	
	Build New Plan
* Appraisal Type Annual Appraisal - DoD 🔻	
GTIP 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.	
* 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 Name Reviewer, Higher Level 🔍	
MyBiz+ ICE My Biz ICE MyPerformance FAQ Logout	

Figure 10 - Create Performance Plan





4. The *Plan Details* page is displayed in Figure 11 below. On this page you can review the plan details once more and you may make necessary changes if needed. If you need help on this page, select the <u>Need Help?</u> link. The DoD Performance Management Appraisal Program is tab driven. You can use the tab navigation to go to another part of the performance plan (i.e., Mission Goals, etc.) or select the **Save and Continue** button.

Plan Reports/Forms	
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments	
	Choose an Action 🔹 Go
Employee Information	
Employee Name EHRIS Bolkvhf, Ayzttzijf Stone Employee Detak	
This screen allows you to view and change the details of your employee's performance plan.	Select appropriate tab for next
Step 1: Plan Details	
Verfy 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: Meson Goals. TIP: Choose an Action – located at the top right corner – alows for selection of other actions throughout the performance cycle. For additional guidance, select <u>Need Help2</u>	
* Appraisal Type Annual Appraisal - DoD Performance Plan Approval Date Plan Lat Model	
* Appraisal Period Start Date: 01-Apr-2010 * Appraisal Period End Date: 31-Mar-2017	
* Appraisal Effective Date 01-Juin-2017 Rating Official Name EHRIS Axwskybxsayu, Pmkmtway U Higher Level Reviewer EHRIS Auesiqzu, Xcnaxdu	
	Save and <u>C</u> ontinue
MyBi₂+ FAQ_Logout About this Page Privacy Statement	

Figure 11 - *Plan > Plan Details* Page

5. The *Mission Goals* page is displayed. Enter your organization's goals so they align your performance elements and standards with your organization's goals and priorities and select the **Save and Continue** button.

Plan Reports/Forms		
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments		
	Choose an Action	• Go
Employee Information		
Employee Name EMRIS Aocxiagc, Qxebokcnl L Show Employee Details		
This screen allows you to enter your Component organizational values, mission statements, or goals which apply to your performance elements and standards. Step 2: Mission Goals		
Enter your Component's organizational values, mission statement, or goals directly in the text box or copy and paste from another document. Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards. Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Details.		
For additional guidance, select Need Help?		
DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, ethics, honor, courage, and loyalty.		
Enter goals here. You have a limit of 1400 characters.		
(umit to \$400 characters) Spell Check Counter	Save and Go Back	ave and <u>Continue</u>

Figure 12 - Plan > Step 2: Mission Goals Page





6. The *Performance Elements and Standards* page is displayed as depicted below. To add a performance element, select **Add Performance Element** button.

Plan Reports/Forms					
Step 1: Plan Details Step 2: Mission Goals Step 3: Performan	ce Elements and S	tandards Step 4: Approv	als and Acknowledgments		
				Choose an Action	• Go
Employee Information					
Employee Name EHRIS Aocxiagc, Qxetxkcnl L + Show Employee Details					
This screen allows you to add or update a performance element and view a	pproved performance	e elements. Performance eleme	ents should be written using the SMART criteria. Select N	eed more information? link to view	r the SMART criteria.
Step 3: Performance Elements and Standards					
Select Add Performance Element button to add a new performance Select Update button under the Details Action column to update a p Select View button under Details Action column to view an approve Select Deteite icon under the Details Deteite column to delete a nun Select Save and Continue button at the bottom right corner to move Select Save and Go Back button at the bottom right corner to go bac For additional guidance, select <u>Need Help?</u>	erformance element d performance eleme pproved performance to Step 4: Approvals	that has not been approved. nt. e element. and Acknowledgements.			-
				Add Performance Element	
Details Number	Title	Status	Element Type	Action	Delete
No results found.					
				Save and Go Back	Save and Continue

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

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

Add Performance Element and Standard(s)						
Indicates required field				W.C.		n
				Save	Save and Add Another Performance Elemen	t Go Back to Performance Elements
This screen allows you to add performance element a	nd standard(s)					
Enter the Performance Element title and verify	the Performance Element Start Date.					
Enter your performance element and standard	i(s) in the text box or copy and paste from another document.					
Select Save button at top right corner to perk	idicały save your work.					
	ment button to save and add a new performance element and standard(s).					
	n to go back to Step 3: Performance Elements and Standards.					
 If you select Return to Performance El 	ements button without saving, a warning message will display.					
For additional guidance, select Need Help?						
Performance Element Number	1					
* Performance Element Title	PE 1 - Element Title					
* Performance Element Start Date	11-Apr-2017 (example: 18-Peb-2016)					
Performance Element Status	Pending					
Date Last Modified	18-Feb-2016					
* Performance Element Type	Critical					
Performance Element and Standard(s)						
Enter performand standard(s) here characters.	e elements and You have a limit of 1000	*				
(Limit to 1000 characters)			Spell Check	Counter		

Figure 14 - Add Performance Element and Standards Page





Table 3 - Performance Element and Standards Fields and Descriptions

The table below provides a description for each of the performance element and standards fields.

Field	Description
*Performance Element Title	Give a brief description of the performance element. You may enter up to 80 characters
*Performance Element Start Date	This field defaults to the current date
	Normally it should be the same as the Appraisal Period Start Date on the <i>Create</i> <i>Performance Plan</i> page, but it may be different if a performance element does not become active until a later date due to an anticipated change in your job responsibilities
*Performance Element Type	Select Critical for each performance element
*Performance Element and Standard(s)	Give a detailed description of the performance element. Performance elements and standard(s) should be Specific, Measurable, Aligned, Realistic, and Timed (SMART). The character limit for this field is 1000. An employee can have no more than 10 performance elements

Table 4 – Decision Table for Performance Elements

The table below provides direction based on the scenario indicated.

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





8.. Select the **Save** button and then the **Go Back to Performance Elements** button when you have completed entering your performance elements. (See Figure 14 on page 16)

Since performance elements have been added, you can update, add, or delete a performance element.

Plan Reports/Forms Step 1: Plan Details Step 2:	Mission Goals Step 3: Performance Elements and	tandards Step 4: Approvals and Acknowledgments			
				Choose an Action	• Go
Employee Information					
Employee Name EHRIS Acoda Show Employee Details	gc, Qxetxkcni L				
This screen allows you to add or u	pdate a performance element and view approved perform	nce elements. Performance elements should be written using	the SMART criteria. Select Need more informatio	m2 Ink to view the SMART criteria.	
Step 3: Performance Elements an	d Standards				
 Select Update button under Select View button under 0 Select Delete icon under th Select Save and Continue 	ement button to add a new performance element and stan er the Detail Action column to update a performance ele betala Actoric oxidumn to view an approved performance the Details Delete column to delete an unapproved performa- button at the bottom right corrent to move to Step 2.1 MB storh at the bottom right corrent to go back to Step 2.1 MB	ent that has not been approved. ment. nce element. rovals and Acknowledgements.	a plan you are bu	lete a performance element or uilding, select the Delete icon ace element you want to delete	
For additional guidance, select. No	sed.Help2			(<u></u>	
Show Al Details Hide Al Details				Add Performance Element	
Details Number	Title	Status	Element Type	Action	Deete
Show 1 *	Performance Element 1	Pending	Critical	Update	1
Show 2 *	Performance Element 2	Pending	Critical	Update	1
🗃 Show 3 💌	Performance Element 3	Pending	Critical	Update	8
				Save and Go	Back Save and Continue

Figure 15 -Plan > Step 3: Performance Elements and Standards Page

9. You can review all the information you have entered on the performance plan before transferring it to your rating official for review.

To view an individual performance element, select +**Show**. To collapse the performance element, select -**Hide**. This function is available throughout the tool. (See Figures 16 and 17 below)

\square					Add Performance Element	
Show AL	etals Hide Al Detals					
Details	lumber	Title	Status	Element Type	Action	Delete
⊡ Hide		Performance Element 1	Pending	Critical	Update	8
Per Thè	ormance Element 1 is the standard for Performance Ele	ement 1.				
	2 -	Performance Element 2	Pending	Critical	Update	8
Show Show		Performance Element 3	Pending	Critical	Update	8
_					Save and Go Back	Save and <u>Continue</u>

Figure 16 - Plan > Step 3: Performance Element and Standards Page

• To view all details of your performance element, select **Show All Details**. To collapse, select **Hide All Details** link.

Show Al Details Hide Al Deta	da .			Add Performance Element	1
Details Number	Title	Status	Element Type	Action	Delete
⊖tikle 1 •	Performance Element 1	Pending	Ortical	Update	1
Performance Element 1 This is the standard for P	erformance Element 1.				
🗃 tikże 💈 💌	Performance Element 2	Pending	Ortical	Update	8
Performance Element 2 This is the same for Perfo					
🗃 19de 3 💌	Performance Element 3	Pending	Ortical	Update	1
Performance Element 3 And again, this is the san	ne information for Performance Element 3.				
And again, this is the san	e information for Performance Element 3.				ack Save and Q





10. At this point you have completed your plan and are ready to transfer it to the rating official for review. There is no further action for you at this time on the *Step 4: Approvals and Acknowledgments* tab.

Plan Reports/Forms Step 1: Plan Detalls Step 2: Mission Goals Step 3: Performance Elements and Standards St	ep 4: Approvals and Acknowledgments			
			- Choose an Action	- 6
Employee Information				
Employee Name EHRIS Accidage, Oxetokeni L				
Show Employee Details				
This screen provides information regarding the detailed status of your performance plan. Select 'Show' ink to see approvals and acknowledgments information for each step. Select the 'Acknowledge Receipt' button, if available.	Employee does not	7		Need He
Show Al Details Hide Al Details	acknowledge plan until Steps			
Details Tasks Stop: Step 1: Rating Official - Request or Document Higher Level Review	1-3 have been completed	Status Not Started		
Storr Step 2: Higher Level Reviewer - Review	1-0 Have been completed	Not Started		
Show Step 3: Rating Official - Document Communication to Employee		Not Started		
		Not Started		

Figure 18 - Plan > Step 4: Approvals and Acknowledgements Page

11. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right. (See Figures 19 and 20 below)

Plan Reports/Forms		
Step 1: Plan Details Step 7: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments		
		Choose an Action • Go
Employee Information		
Employee Name EHRIS Aocidage, Oxetokicni L		Choose an Action Change Rating Official or Higher Level Reviewer
en store tracke ordela		Transfer to Rating Official
	•	Track Progress Return to Main Page
This screen provides information regarding the detailed status of your performance plan.		Need Help?
Select Show link to see approvals and acknowledgments information for each step. Select the 'Acknowledge Receipt button, I available.		
Show Al Details Hide Al Details		
Details Tasks	Status	
Show Step 1: Rating Official - Request or Document Higher Level Review	Not Started	
Shoar Step 2: Higher Level Reviewer - Review	Not Started	
(a) Show Step 3: Rating Official - Document Communication to Employee	Not Started	
Show Step 4: Employee - Acknowledgment	Not Started	
		Save and Go Back



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

Figure 20 - Plan > Step 4: Approvals and Acknowledgements Page - 'Choose an Action' List of Values





12. You have the option to transfer to the rating official with or without e-mail

notification. If you chose to enter comments in the **Message to Rating Official** area, your message will show up in the e-mail. Select the **Transfer to Rating Official without E-mail Notification** or **Transfer to Rating Official with E-mail Notification** button to transfer your performance plan to your rating official.

Employee Notification to Rating Official - EHRIS Axweskybxeayu, Pmkmtway U
Cancel Transfer to Rating Official without E-mail Notification Transfer to Rating Official with E-mail Notification
Hessage to Rating Official
This screen allows you to send a message to your Ruting Official (RO) regarding your performance plan/appraisis. The notification can be sent with or without an email message.
To provide additional information to the RO, enter a message in the text box below Hessage to Rating Official and select Transfer to Rating Official and hotPy by E-mail button at top right corner. # You choose not to send a message, select Transfer to Rating Official indications button. You will need to contact the RO directly. Select Cannot buttin a top right corner to po but to previous revenue whole makings.
For additional guidance, select. Need Help2
Enter message to Rating Official here.
Spel Check
Notor: You are about to contact DH825 Annskybixsayu, Pmikmburg U 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.

Figure 21 - Plan> Step 4: Approvals and Acknowledgements>Employee Notification to Rating Official Page

13. You will be returned to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. Your performance plan is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page* as pictured below in Figure 23. You no longer have ownership and can only view your performance plan.

MyPerformance Main Page Pro	ovide Guest Feedback My Journal										
Confirmation The appraisal has been submitte Employee	ed to the rating official.										
		м	yPerform	ance Mai	in Page						
									N	eed Help?	
	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; v	iew and print part or an entire plan after it is o	eated; and track the	status of a plan. Yo	u can also search for com	pleted plans by selecting	the 'Show Completed	Plans/Appraisais' link loc	ated at the bottor	i of this pay	je.
To create a Performance Plan:	To complete other actions descri	bed above:									
 Select 'Choose a Plan Type' Select Appraisal Plan Type Select the 'Go' button 	 Select an option from the Select the 'Go' button 	Action column									
Important: To become familiar with	h the columns, select the 'Need Help?' link.										
Appraisals of EHRIS Accidage,	Qxebskcni L										
								Create New Plan		• 60	-
							-010056	a Plan Type		• 60	<u> </u>
Records Displayed 10 Employee Name	Current Owner	Rating Official Name	Appraisal Year	Approximat TD	Plan Approval Date	Type Plan Status	Current Status	Action			
EHRIS Aocxiage, Qxetxkeni L	EHRIS Axwskybxsayu, Pmkmbway U	EHR2S Axwskybxsayu, Pmkmbway U	2016	74	Fail Approval bace	DoD Pending	Plan in Progress	Vev	•	60	
Select the link to search for complete Show Completed Plans/Appraisals											

Figure 22 - MyPerformance Main Page





Editing the Performance Plan (Employee)

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

- Editing draft performance elements created by your rating official
- Creating new performance elements

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

Follow these steps to review and edit your performance plan:

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

										Ne	eed Help?
	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.										
rom 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/Appraisal' Inik located at the bottom of this page.											
To create a Performance Plan: To complete other actions described above:											
 Select Appraisal Plan Type Select the 'Go' button 	Select the 'Go' button										
Appraisals of EHRIS Accidage	th the columns, select the 'Need Helpi	7 EK.									
Appraisals of Efficis Account	ç Qitebbichi L								Create New P	-	
								Choo	se a Plan Type		• Go
Records Displayed 10 -											
Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type Pla	an Status	Current Status	Action		
EHRIS Aocxiago, Qxebikoni L	EHRIS Aocxiage, Qxebxkoni L	EHR2S Axwskybxsayu, Pmkmbway U	2016	74		DoD Per	nding	Plan in Progress	Update		• 🗸
Select the link to search for complete Show Completed Plans/Apprate											

Figure 23 - MyPerformance Main Page





2. The *Plan Details* page is displayed as pictured below in Figure 24. Review the **Plan Details** and, if needed, make required changes. Select the **Save and Continue** button to navigate to the *Mission Goals* tab. If you need to get out of the tool at this time, you should select the **Choose an Action** (list of values (LOV)), select **Return to Main Page,** followed by the **Go** button to go back.

Plan Reports/Forms					
Step 1: Plan Details Step 2:	Mission Goals Step 3: Performance Eleme	ents and Standards Step 4: Approval	s and Acknowledgments		
				Choose an Action	• Go
Employee Information					
Employee Name EHRIS Aocxia	gc, Qxetxkcni L				
This screen allows you to view an	d change the details of your performance plan/appr	aisal.			
Step 1: Plan Details					
	and rating official and higher level reviewer names outton at the bottom right corner to move to Step 2		essary changes.		
TIP: Choose an Action - located a	at the top right corner – allows for selection of othe	r actions throughout the performance cycle.			
For additional guidance, select N	eed Help?				
* Appraisal Type	Annual Appraisal - DoD ·	Performance Plan Approval Date Plan Last Modified Date			
* Appraisal Period Start Date	01-Apr-2016		EHRIS Aocxiagc, Qxetxkcnl L		
* Appraisal Period End Date	31-Mar-2017				
* Appraisal Effective Date	and a second				
	EHRIS Axwskybxsayu, Pmkmtway U EHRIS Auesqzu, Xcnaxdu				
					Save and Continue

Figure 24 - *Plan > Step 1: Plan Details* Page

2. The *Mission Goals* page is displayed as pictured below in Figure 25. Review the **Mission Goals** and, if needed, make required changes. Select the **Save and Continue** button to navigate to *Performance Elements and Standards* tab. If you need to go to the *Plan Details* tab, use the **Save and Go Back** button.



EW BEGINNINGS	MyPerfori Employee
Kan Reports/Forms Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments	
Employee Information Employee Name EHRIS Accidage, Qxebskoni L B Show Employee Datals	
This screen allows you to enter your Component organizational walues, mission statements, or goals which apply to your performance elements and standards. Step 2: Mission Goals	
Enter your Component's organizational values, mission statement, or goals directly in the text box or copy and paste from another document. Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards. Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Details.	
For additional guidance, select. Need Help2	
DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, ethics, honor, courage, and kyałty.	
Enter your Component's organizational values, masion statement, or goals directly in the text box or copy and paste from another document. Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards	
Exit to 140 dwaters) Spell Check Courter 253	

Figure 25 - Plan > Step 2: Mission Goals Page

3. The *Performance Elements and Standards* page is displayed. If you need to add a performance element, select the **Add Performance Element** button. You can also update your information by selecting the **Update** button.

and the second				- Choose an Action	- 6
mployee Information					
npioyee Name EHRIS Aoo Show Employee Details	xlage, Qxebdical L				
2000.00140120.00040					
is screen allows you to add o	r update a performance element and view approved performance eleme	nts. Performance elements should be written using th	SMART criteria. Select Need more information? in	ik to view the SMART criteria.	
ep 3: Performance Elements	and Standards				
	Element button to add a new performance element and standard(s).				
	r bement button to abo a new performance element and standard(s). nder the Details Action column to update a performance element that ha	s not been approved.			
	er Details Action column to view an approved performance element.				
 Select Delete icon under 	the Details Delete column to delete an unapproved performance element				
 Select Delete icon under Select Save and Continu 	r the Details Delete column to delete an unapproved performance elemer as button at the bottom right corner to move to Step 4: Approvals and	Acknowledgements.			-
 Select Delete icon under Select Save and Control Select Save and Go Back 	r the Details Delete column to delete an unapproved performance elemen as button at the bottom right comer to move to Step 4: Approvala and k button at the bottom right comer to go back to Step 2: Mission Goals.	Acknowledgements.			
 Select Delete icon under Select Save and Continu 	r the Details Delete column to delete an unapproved performance elemen as button at the bottom right comer to move to Step 4: Approvala and k button at the bottom right comer to go back to Step 2: Mission Goals.	Acknowledgements.			5
 Select Delete icon under Select Save and Control Select Save and Go Back 	r the Details Delete column to delete an unapproved performance elemen as button at the bottom right comer to move to Step 4: Approvala and k button at the bottom right comer to go back to Step 2: Mission Goals.	Acknowledgements.		Add Performance Element	2
 Select Delete icon under Select Save and Control Select Save and Go Back 	the Detail Deter column to deter an unapproved performance eleme technism at the bottom right corner to move to Step 4-2 Reprivals and k button at the bottom right corner to go back to Step 2: Heavin Goals. Need Help?	Acknowledgements.		Add Performance Liement	2
Select Delete kon under Select Save and Control Select Save and Go Bacl radditional guidance, select 1 how Al Details 1 Hole Al Detail table Journey	the Detail Deter column to deter an unapproved performance eleme technism at the bottom right corner to move to Step 4-2 Reprivals and k button at the bottom right corner to go back to Step 2: Heavin Goals. Need Help?	Acknowledgements.	Konent Type	Add Performance Liement	Dekte
Select Delete icon under Select Save and Continu Select Save and Go Back additional guidance, select how All Details Hidd: All Detail table Tables (Show 1 *	the betab Delete column to delete an unagoroval performance eller te button at the bottom right come in more vol Stage 1. (approvalia and k button at the bottom right comer to go back to Step 2. Heavin Goals. Need Jitelio?	Adaroviedgements.	Remost Type Ottol		
Select Delete ion under Select Save and Contru Select Save and Contru Select Save and Go Baci additional guidance, select how Al Details Hele Al Detail	The Detable Deter culture to deter an unapproved performance element to both and the bothom right comer to nove to Step 4, Approval and Ak k hutton at the bottom right comer to go back to Step 2. Husion Goals. Need Helio2	Achroviedgements.		Action	Dokte
Select Delete icon under Select Save and Continu Select Save and Go Back additional guidance, select how All Details Hidd: All Detail table Tables (Show 1 *	the Detable Deter culture to deter an unapproved performance element to both or the bothom right correr to one to specify a performance element to both or at the bothom right correr to ge back to Step 2; Hesion Goals. Need Indet2	Adarowledgements. Status Pending	Ortical	Action Update	
Select Deter icon under Select Save and Control Select Save and Go Baci r additional guidance, select (Hote Al Details Founder Soon 1 Soon 2 Soon 2 Soon 2 Soon 2 Soon 2 Soon 3 Soon 3	The Detable Deter culture to deter an unapproved performance element to both and the Detable right Correct to ever this Start 2, Hassen Gala & Audition 4 and Audition right Correct to get back its Start 2, Hassen Gala. NeedLinkeliz Performance Denent 1 performance Denent 2	Adrowledgements. Nitahus Pending Pending	Critical Critical	Action Spdate Update Update	8

Figure 26 - Plan > Step 3: Performance Elements and Standards Page

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



Add Performance Element and Standard(s) * Indicates required field			
When we want the second se		Save Save	
This screen alows you to add performance element and standard(s)			
Enter the Performance Element title and verify the Performance Element Start Date.			
Enter your performance element and standard(s) in the text box or copy and paste from another document.			
 Select Save button at top right corner to periodically save your work. 			
 Select Save and Add Another Performance Element button to save and add a new performance element and standard(s). 			
 Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards. If you select Return to Performance Elements button without saving, a warning message will display. 			
For additional guidance, select Need Help?			
Performance Element Number 1			
* Performance Element Title PE 1 - Element Title			
* Performance Element Start Date 04-Apr-2017			
(example: 18+eb-2016)			
Performance Element Status Pending			
Date Last Modified 18-Feb-2016			
* Performance Element Type Critical 🔹			
Performance Element and Standard(s)			
This information is based on the performance element identified in PE 1.	~		
Performance Element and Standard(s)			
This information is based on the performance element identified in PE 1.	^		
Performance Element and Standard(s)			
ins mormation s based on trie performance element dendried in PE 1.	·		

Figure 27 - Add Performance Element and Standard(s) Page

5. If you need to update an existing performance element, select the **Update** button under the **Action** column. **NOTE**: Once the performance plan is approved, you, the employee, cannot delete a performance standard and element.

	2: Hission Goals Step 3: Performance Elements and Standards			- Choose an Action -	• 6
Imployee Information				- 0.000 0170001 -	
mpioyee Name EHRIS Ao Show Employee Details	colarge, Quetolicní I.				
This screen allows you to add	or update a performance element and view approved performance eleme	nts. Performance elements should be written using t	he SHART ortera. Select Need more information?	Ink to view the SMART criteria.	
itep 3: Performance Element	s and Standards				
 Select Update button Select Vew button un Select Delete icon und Select Save and Conti 	te Element button to add a new performance element and standard(s), under the Details Action column to update a performance element. But his Details Action column to yeak angevoid performance element. If the Details Details column to the sin approved performance element, en the Details Details column to detek an unapproved performance element, est button at the bottom mg/st corner to go back to Starp 2: Mission Goals. Need Media.	L.	a plan you are bui	ete a performance element of Iding, select the Delete icon se element you want to delete	
				Add Performance Element	
Show Al Details Hide Al De Details Number	ub Title	Status	Element Type	Active	Deete
B Show 1 -	Performance Element 1	Pending	Critical	, Update	1
	Performance Element 2	Pending	Ottoi	Update	
Show 2 -					

Figure 28 - Plan > Step 3: Performance Elements and Standards Page





6. Review performance elements, and, if needed, make required changes.

Update Performance Element and Standard(s)				
Indicates required field				01
				Save Go Back to Performance Elements
This screen allows you to update a performance element	ent and standard(s).			
 Varby the Deformance Element The and start 	date; update the performance element and standard(s) in the text box below, or copy and paste fro	m another document		
 Select Save button at top right corner to perio 		ATT OTRATION OR ADDITION OF		
	ment button to save the performance element you worked on and another page will display to add a	nother performance element		
	to go back to Step 3: Performance Elements and Standards.	nours perormance dements		
	ements button without saving, a warning message will display.			
o a you spect return to Performance of	nients outton wohout saving, a warning niessage willoopay.			
For additional guidance, select Need Help?				
Performance Element Number				
* Performance Element Title		_		
* Performance Element Tibe	PE 2 - Second Element Title			
* Performance Element Start Date	05-Apr-2016			
	(example: 13-Feb-2016)			
Performance Element Status	Pending			
Date Last Modified	18-Feb-2016			
* Performance Element Type	Critical •			
Performance Element and Standard(s)				
This information would be related to the performa performance element in this screen.	nce element identified in the title area. This information is added to show the updating of a			
(Limit to 1000 characters)		Spell Check	Counter 179	

Figure 29 - Update Performance Element and Standard(s) Page





Table 5 – Decision Table for use when editing Performance Elements and Standards

Complete the page using one of the following options:

If You	Then
Want to cancel the changes to an existing performance element	Select the Go Back to Performance Elements button <u>Go Back to Performance Elements</u> You will receive a warning message asking if you want to save the changes. Select the No button
Want to save the changes you made to the existing performance element and update another performance element	Select the Save button and then select Go Back to Performance Elements buttonSaveGo Back to Performance Elements
Want to save your updates periodically on the same page	Select the Save button
Finished updating performance elements and want to return to the <i>Performance Elements and</i> <i>Standards</i> tab	Select the Save button and then select Go Back to Performance Elements button Save Go Back to Performance Elements

7. At this point you have made all of the changes for your plan and are ready to transfer it to the rating official for review. There is no action for you, the employee, on the *Approvals and Acknowledgments* tab.

Plan Reports/Forms Step 1: Plan Details Step 2: Mission Goals Step 3: Performance (Isenents and Standards) Step 4: Appendix	orals and Acknowledgements		- Choose an Action - 🕑 🛛 Ge
Employee Enformation Employee Name EMRIS Chartmann, Lajouft III 22cm Employee Extent			
This screen provides information regarding the status of your performance plan. Select TV Dow' link to see approvals and acknowledgements information for each step. Select the 'Acknowledge Record' button, if available. Stock Abstatis Details' table Stock Totals 1 biol. All Databi Details' table Stock Total 2: Indige Official - Request of Document Higher Level Review Stock Total 2: Indige Official - Request of Document Higher Level Review Stock Total 2: Indige Official - Request of Document Higher Level Review Stock Total 2: Indige Official - Request of Document Higher Level Review Stock Total 2: Indige Official - Request of Document Higher Level Review Stock Total 2: Indige Official - Request of Document Diget Review Stock Total 2: Indiget Level Acknowledgement Stock Total 2: Indiget Control - Review Stock Total 2: Indiget Control - Review Stock Total 2: Indiget Level Acknowledgement Stock Total 2: Indiget Control - Review Stock Total 2: Indiget C	Employee does not acknowledge plan until Steps 1-3 have been completed by the rating official/higher level reviewer.	Status Conspleted Conspleted Not Started Not Started	beed.rstu?
1			Go Back

Figure 30 - Plan > Step 4: Approvals and Acknowledgements Page





8. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right.

tep 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgements		
mployee Information		- Choose an Action - 💟
replayee Name: EHRUS Gleatenaae, Lajvelt Stora: Employee Defails		
his screen provides information regarding the status of your performance plan.		Steed 15
Selet: Show Init to see approval and advoceledgments information for each step. Select the "Advoceledge Receipt" buttor, if available.		
ov Al Detais i side Al Detais		
rtalls Tasks	Status	
Stop 1: Rating Official - Request or Document Higher Level Review	Completed	
Stop Step 2: Higher Level Reviewer - Review	Completed	
Show Step 3: Rating Official - Document Communication to Employee	Not Started	
Stop 5: Employee - Acknowledgment	Not Started	

Figure 31 - *Plan > Step 4: Approvals and Acknowledgements* **Page**

Choose an Action Change Rating Official or Higher Level Reviewer	
Transfer to Rating Official	<
Track Progress	7
Return to Main Page	

Figure 32 - *Plan > Step 4: Approvals and Acknowledgements* Page - 'Choose an Action' List of Values

9. You have the option to transfer to the rating official with or without e-mail notification. If you choose to enter comments in the **Message to Rating Official** area, your message will show up in the e-mail. Select the **Transfer to Rating Official without E-mail Notification** or **Transfer to Rating Official with E-mail Notification** button to transfer your performance plan to your rating official.

Resolver a Marilla da Resida Resida Resoluti Resoluti Associa Restanta da	
Employee Notification to Rating Official - EHRIS Axwskybxsayu, Pmkmtway U	Cancel Transfer to Bating Official without E-mail Notification Transfer to Bating Official with E-mail Notification
	Cancel Transfer to Bating Official without E-mail Notification Transfer to Rating Official with E-mail Notification
Message to Rating Official	
This screen allows you to send a message to your Rating Official (RO) regarding your performance plan/appraisal. The notification can be sent with or without an email m	esage.
 To provide additional information to the RO, enter a message in the text box below Message to Ruting Official and select Transfer to Ruting Official and Notify by E Fyou choose not to send a message, select Transfer to Ruting Official Work (Model and Notification button, You will need to contact the RO directly, Select Cancel Button at tograf comert up abusc to pervise screen whole multitorial Work (Model) 	E-mail button at top right corner.
For additional guidance, select. Need Help?	
Enter message to Rating Official here.	
Notoc: You are about to contact EHR2S Annshybrianyu, Prekentivary U by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include an	pel Check y non-public information such as social security numbers or privacy act information in your e-mail.

Figure 33 - Plan > Approvals and Acknowledgements > Employee Notification to Rating Official Page





10. You will be navigated to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. You no longer have ownership and can only view your performance plan.

Performance Hain Page Provid	de Guest Feedback My Journal											
Confirmation The appraisal has been submitted to	to the rating official.											
nployee												_
		M	lyPerform	ance Ma	in Page							
										5	ieed Help?	
		is designed for sensitive unclassifie a violation of law and may lead to		mation only. (Do NOT enter classif	led inform	ation in th	is system. Unaut	thorized release			
om the Main Page, you can create, up	pdate and view your Performance Plans;	iew and print part or an entire plan after it is o	reated; and track the s	itatus of a plan. Yo	ou can also search for com	pleted plans b	by selecting th	he 'Show Completed I	Plans/Appraisals' link loo	ated at the bottor	n of this pay	je.
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oreate a Performance Plan: Select 'Choose a Plan Type' Select Appraisal Plan Type Select the 'Go' button	To complete other actions descr Select an option from the Select the 'Go' button											
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Figure 34 - MyPerformance Main Page with Confirmation





Acknowledging the Performance Plan (Employee)

After your rating official has finalized your performance plan and, if necessary, the performance plan has been approved by the higher level reviewer, he or she transfers the plan to you. The employee and the rating official should communicate about the final plan, then acknowledge the performance plan has been communicated to you.

Acknowledging the performance plan was communicated to you does not mean you agree with it; you are merely acknowledging it was communicated to you by your rating official. You are encouraged to engage in two-way communication with your rating official, if necessary, before you reach the acknowledgement stage to try to resolve any disagreements and determine performance elements and standards that are mutually understood by both you and your rating official.

The performance plan must be approved within 30 days from the start of the rating cycle, entrance on duty, or job change, unless an extension is granted.

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

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





Follow the below steps to acknowledge communication of your performance plan.

1. When Steps 1 and 2 of the *Plan Approvals and Acknowledgments* (see Figure 35 below) have been completed, you will receive an email message stating that your plan has been approved. (See Figure 36)

Plan Reports/forms	
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments	
	- Choose an Action 💙 🛛 Go
Employee Information	
Employee Name DHUS CRotmunn, Lajveft 18 Scon Employee Details	
This screen provides information regarding the status of your performance plan.	Need_Help?
Select 'Show' link to see approvale and advoowledgments information for each step. Select The "Advoowledge Receipt" button, if available.	
Show, All Details Edu All Details	₩
	Status
	Completed
	Completed
	Not Started
3 2000 Step 4: Employee - Acknowledgment	Not Started
	Go Back

Figure 35 - Step 4 Approvals and Acknowledgement Tab



Figure 36 - Email to Employee - Plan Approved

2. When the rating official completes Step 3 on the *Approvals and Acknowledgments* tab and the rating official selects **Transfer to Employee with E-mail Notification**, the employee will receive an email message. The email will communicate where you need to proceed in the performance plan/appraisal process.

From: O	Sent: Twe 8/38/2015 3.00 i
To:	
Cc 🖉	
Subject: Your Per	Performance Plan has been transferred to you for acknowledgment.
Tereiseri	1 · · · · 2 · · · 3 · · · · 4 · · · · 5 · · · 6 · · · · 7 · · · 6 · · · · 7 · · · 6 · · · ·
Your Performance	nce Plan has been transferred to you for acknowledgment.
	to the Performance Management and Appraisal and select the Approvals and Acknowledgments tab located under the Plan tab and complete Step 4. Once you've acknowledged, a copy of the DoD PMA form will be available in the is and Appraisals area.
https://warlock.d If this link does no 1. Open a Web br	ovided below to access the Defense Civilian Personnel Data System portal page to log in and access the Performance Management and Appraisal: <u>cdcpds.cpms.cpdf.ml/CA_IMTML/AppsLocalLogin.isp</u> net work_follow these steps: browser window. ste the entire Web address into the location or address bar of the browser.
Please Do Not Re	Reply to this Email

Figure 37 - Email to Employee - Next Steps









3. Select the performance plan that needs to be acknowledged from *MyPerformance Main Page*.

mployee				ly Perform	ance Main Pa	ne .				
				lyr enonn		ge				
										Need Heip?
		This application is designed for se formation is a violation of law and			ion only. Do NOT enter o	lassified inf	formation in t	nis system. Unauth	orized release of	
om the Main Page, you can creat	e, update and view your P	Performance Plans; view and print part o	r an entre plan after it is o	reated; and track the	status of a plan. You can also	search for co	ompleted plans b	y selecting the 'Show (Completed Plans/Appraisals' link	k located at the bottom of this page.
o create a Performance Plan:	To complete o	ther actions described above:								
 Select 'Choose a Plan Type' Select Appraisal Plan Type Select the 'Go' button 		an option from the Action column the 'Go' button								
 Select Appraisal Plan Type Select the 'Go' button 	 Select (the 'Go' button								
 Select Appraisal Plan Type 	Select t th the columns, select the	the 'Go' button								
Select Appraisal Plan Type Select the 'Go' button mportant: To become familiar wit	Select t th the columns, select the	the 'Go' button							Create New I	Plan
Select Appraisal Plan Type Select the 'Go' button aportant: To become familiar wit	Select t th the columns, select the	the 'Go' button							Create New I	Plan Go
Select Appraisal Plan Type Select the 'Go' button aportant: To become familar wit Appraisals of DCPAS Bisslar, D	Select t th the columns, select the	the 'Go' button		_		_	_			
Select Appraisi Plan Type Select the 'Go' button sportant: To become familiar wit Apprecisite of DCPAS Beckty D ecords Displayed 10	Select t th the columns, select the	the 'Go' button	Appraisal Year	Appraisal ID	Plan Approval Date	Туре	Plan Status	Current Status		
Select Apprasil Plan Type Select the 'Go' button mportant: To become familiar wit Appraisals of DCDAS INSULY, D econds Deplayed 10 mployee Name O	Select 1 th the columns, select the weed L	'Need Help?' Ink.	Appraisal Year 2016	Appraisal ID 16	Plan Approval Date 01-Jun-2015		Plan Status Approved	Current Status Plan Approved	Choose a Plan Type	

Figure 38 - MyPerformance Main Page - Pending Acknowledgement

4. You can review the performance plan details, mission goals and performance elements and standards before navigating to *Approvals and Acknowledgments* tab to acknowledge your plan. NOTE: Once the plan has been approved *Progress Reviews, Annual Appraisal, and Narrative Statements* tabs become available.

Plan Progress Reviews Ann	nual Appraisal Narrative Statements	orts/Forms			MyBiz+ FAQ Logout
Step 1: Plan Details Step 2:	Mission Goals Step 3: Performance Elem	ents and Standards Step 4: Approvals an	nd Acknowledgments		
				Choose an Action	▼ Go
Employee Information					
Employee Name EHRIS Accda	agç, Qxebokcni L				
This screen allows you to view an	d change the details of your performance plan/ap	ppraisal.			
Step 1: Plan Details					
Select Save and Continue	and rating official and higher level reviewer names button at the bottom right corner to move to S at the top right corner – allows for selection of o eed Help?	tep 2: Mission Goals.			
* Appraisal Type	Annual Appraisal - DoD 🔻	Performance Plan Approval Date			
* Appraisal Period Start Date	01-Apr-2016	Plan Last Modified Date Created By	05-Apr-2016 EHRIS Aooxiagc, Qxebxkcnl L		
* Appraisal Period End Date	31-Mar-2017				
* Appraisal Effective Date	01-Jun-2017				
	EHRIS Axwskybxsayu, Pmkmtway U EHRIS Auesqzu, Xcnaxdu				
					Save and Continue
About this Page Privacy Statem	ent		MyBiz+ FAQ Logout		
	Figure 39	- <i>Plan</i> tab - Iden	tifying Additional Tab A	vailability	





5. Step 4 – *Details / Tasks* shows pending employee acknowledgment and the **Acknowledge Receipt** is available for selection. Select **Acknowledge Receipt** button.

DoD Performance Management Appraisal Program			
Plan Progress Reviews Annual Appraisal Narrative Statements Reports/Forms			MyBiz+ FAQ Logout
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step	4: Approvals and Acknowledgments		
			Choose an Action Go
Employee Information			
Employee Name EHRIS Aocxiagc, Qxebxkcnl L			
This screen provides information regarding the detailed status of your performance plan. Select 'Show' link to see approvals and acknowledgments information for each step.			Need Help?
 Select the 'Acknowledge Receipt' button, if available. 			
Show All Details Hide All Details			
Details Tasks	Status	Action	
Show Step 1: Rating Official - Request or Document Higher Level Review	Completed	Step 1 completed	
Show Step 2: Higher Level Reviewer - Review	Completed	Step 2 completed	
Show Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed	
Show Step 4: Employee - Acknowledgment	Pending Empl Acknowledgment	Acknowledge Receipt	
	MyBiz+ FAQ Logout		Save and Go Back
The AQ DI C	Myber PAQ Logodi		

Figure 40 - Plan>Step 4 Approvals and Acknowledgements tab

6. When you select **Acknowledge Receipt** a **Date box** is available. You can manually enter the date or use the calendar icon. Enter the date you are acknowledging and select the **Save** button.



NEW	
BEC	GINNINGS

Approvals and Acknowledgments	
	Action
	Step 1 completed
Completed	Step 2 completed
Completed	Step 3 completed
Pending Empl Acknowledgment	Acknowledge Rece
1680 EAO Loovel	

Figure 41 - Plan>Step 4 Approvals and Acknowledgements tab

7. Step 4 of the *Details / Tasks* is completed. You have just successfully acknowledged receipt of your performance plan.

		MyBiz+ FAQ Logout		
Plan Progress Reviews Annual Appraisal Narrative Statements Reports/Forms				
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments				
		Choose an Action	▼ Go	
Employee Information				
Employee Name EHRIS Accxlagc, Qxebxkcnl L				
Entropyee Name Entropy Advocage, Quebokchi L				
This screen provides information regarding the status of your performance plan.			Need Help?	
······································			and the second part	
 Select 'Show' link to see approvals and acknowledgments information for each step. 				
Select the 'Acknowledge Receipt' button, if available.				
Show Al Detais Hide Al Detais				
Details Tasks	Status			
Show Step 1: Rating Official - Request or Document Higher Level Review	Completed			
Show Step 2: Higher Level Reviewer - Review	Completed			
Show Step 3: Rating Official - Document Communication to Employee	Completed			
3 Show Step 4: Employee - Advnowledgment	Completed			
		Say	ve and Go Back	
			e and all good	
MyBiz+ FAQ Logout				
Mybi2+ FAG Logiour About this Page Privacy Statement				

Figure 42 - Plan>Step 4 Approvals and Acknowledgement tab

Completed Plans/Appraisals Section

The Completed Plans/Appraisals section allows you to search for and see your past completed plans/appraisals.





Appraisals of On	e, Employee											
								Create New Plan				
								Choose a Plan Typ	-	Go		
	10 -	le constituit des	1			-			1			
Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Dat	e lype	Plan Status	Current Status	Action		_	
One, Employee	Rater, The	Rater, The	2017	53	29-Apr-2016	DoD	Approved	Plan Approved	View		Go	
Select the link to sear	ch for completed plan	15.										
Hide Completed Pl	ans/Appraisals											
Completed Plans	Annraisals											
		e following fields can be ente										
2, Select the Find bu	utton, Your results wil	I be based on your search cr	iteria. If there is no s	search criteria entei	red, your results will be	all Complete	d Plans/Apprai	sals,				
			Appraisal Year	-								
			Event		•							
				Find Clea	r							
Records Displayed	10 🔻											
Appraisal Year		Appraisal ID	Ту	rpe Even	t Event Com	pletion Da	ite		F	leports/Forms		
No search conducted.												
		MyPerformance Main P	age Provide Guest	Feedback My Jo	urnal MyBiz+ ICEMy	Biz ICE My	Performance	Logout Help Diagr	ostics		_	

Figure 43 - MyPerformance Main Page - Completed Plans and Appraisals Section

