

MyPerformance Tool

Rating Official Progress Review Guide:

Create, Transfer to Employee, and Approval and Acknowledgment

Go to DCPDS link: <https://compo.dcpds.cpms.osd.mil/>

- Accept the DoD Notice and Consent Banner
- Select button 'Smart Card Log In'
- Select signature certificate
- Select HR Mybiz+ Tile
- Accept Privacy Statement
- Select Performance Management and Appraisal link located under 'Manager Functions'

MyPerformance Main Page: It's very important that the action column reflects 'Update' for the employee appraisal you want to document. If the action is 'View', select the drop down arrow and select 'Retrieve' from the list. The action status will change from 'View' to 'Update'.

CREATE PROGRESS REVIEW

Steps:

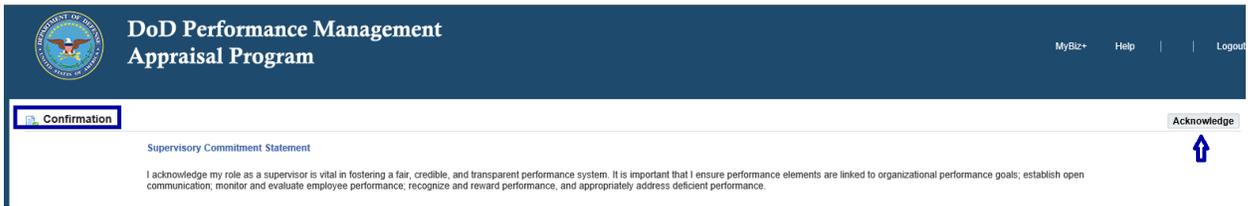
MyPerformance Main Page

1. Select 'Go' button on the employee plan/appraisal that you want to create a Progress Review.

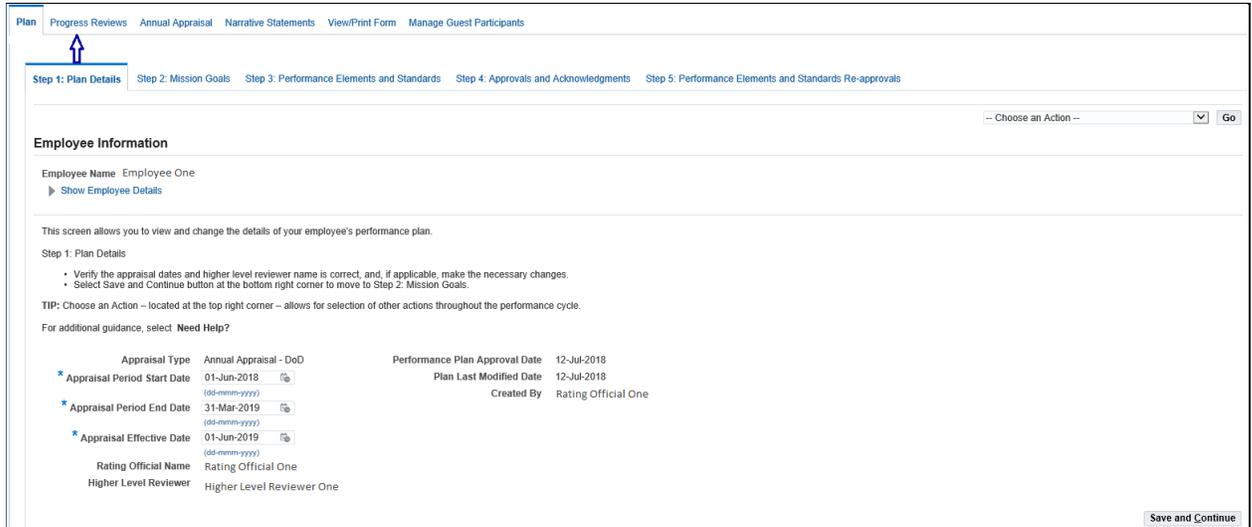
The screenshot shows the 'MyPerformance Main Page' interface. At the top, there is a navigation bar with 'MyPerformance Main Page' and 'Provide Guest Feedback'. Below this is a section for 'Rating Official/Higher Level Reviewer' with a 'MyPerformance Main Page' button and a 'Need Help?' link. A warning message states: '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.' Below the warning, there are instructions on how to create a Performance Plan and complete other actions. A 'Plans/Appraisals In Progress' section includes a 'TIP' and a table of appraisal records. The table has columns for Employee Name, Current Owner, Rating Official Name, Appraisal Year, Appraisal ID, Plan Approval Date, Type, Plan Status, Current Status, and Action. The 'Action' column for 'Employee One' and 'Employee Two' shows 'Update' with a dropdown arrow. The 'Go' button next to the 'Update' action for 'Employee One' is highlighted with a blue arrow.

| Employee Name | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current Status | Action |
|---------------|-----------------|----------------------|----------------|--------------|--------------------|------|-------------|----------------|----------------------|
| Employee One | Rating Official | Rating Official One | 2019 | 742 | 12-Jul-2018 | DoD | Approved | Plan Approved | Update [dropdown] Go |
| Employee Two | Rating Official | Rating Official Two | 2019 | 788 | 02-Apr-2018 | DoD | Approved | Plan Approved | Update [dropdown] Go |

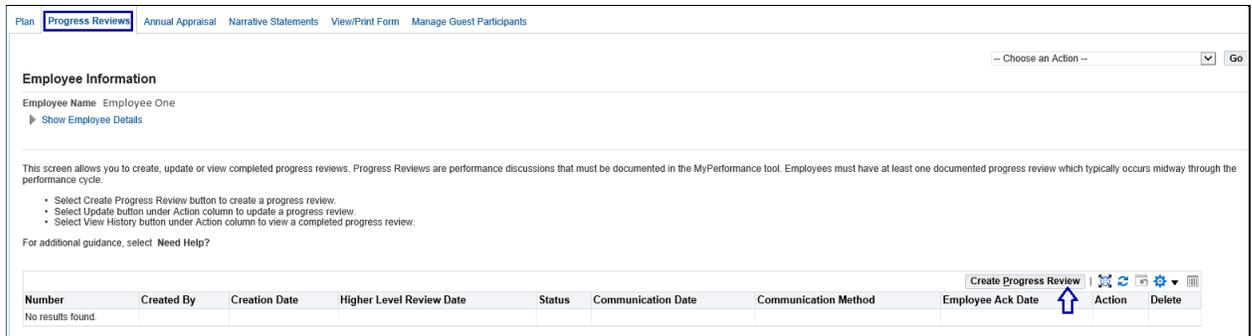
2. Confirmation Message Received: Read the Supervisory Commitment Statement and select the 'Acknowledge' button.



3. Select the 'Progress Reviews' tab.



4. Select the 'Create Progress Review' button.



Progress Review Information Page

On this page, by default, the 'Assessment' tab is the tab shown after selecting the create progress review button. As you can see, both you and the Employee have respective blocks for each Performance Element and Standard(s) to enter comments.

5. Review the Performance Element selected.

The screenshot displays the 'Progress Review Information' page. At the top, it shows 'Progress Review Initiator: Rating Official One' and 'Progress Review Number: 1'. Below this, there are two tabs: 'Assessments' (which is selected and highlighted with a blue border) and 'Approvals and Acknowledgments'. The main content area contains instructions for using the assessment screen, a list of performance elements, and a text box for entering an assessment.

Progress Review Information

A progress review should acknowledge achievements to date and suggested areas for improvement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.

Progress Review Initiator: Rating Official One
Progress Review Status: Initiated
Progress Review Number: 1

Assessments | Approvals and Acknowledgments

This screen allows you to view your employee's performance elements and standards and input and enter your assessments.

- Select Radio button next to the performance element and standard(s) you want to view and enter assessments.
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s).
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select **Need Help?**

Performance Elements

| Order | Performance Element Title | Status | Performance Element Type |
|----------------------------------|---------------------------|----------|--------------------------|
| <input checked="" type="radio"/> | 1 Training | Approved | Critical |
| <input type="radio"/> | 2 Budget | Approved | Critical |

Performance Element and Standard(s)

Provide training modules to employees for new programs within three weeks of deployment.

6. Enter the assessment in the Rating Official Assessment text box.

Note: There is a 2,000 character limit in this text box. Spell Check functionality is available.

The screenshot shows the 'Employee Input' section with a large empty text box. Below it is the 'Rating Official Assessment' section, which contains a text box with a placeholder 'Rating Official Assessment goes into this block.' At the bottom of this section, there is a 'Spell Check' button, a 'Counter' showing '50', and two navigation buttons: 'Go to Next Performance Element' and 'Go Back to Top of Page'.

Employee Input

Rating Official Assessment

Rating Official Assessment goes into this block.

(Limit to 2000 characters) Spell Check Counter 50

Go to Next Performance Element Go Back to Top of Page

7. Select the 'Go to Next Performance Element' button and repeat Step 6 for that Element.

Note: The information entered in each 'Assessments' block automatically saves when navigating to the next element, etc.

- Select the 'Go Back to Top of Page' button if you are done entering assessments for Performance Elements and Standard(s).

Progress Reviews Information area Page

- Select the 'Go Back to Progress Reviews' button.

Progress Reviews Information area

[Go Back to Progress Reviews](#) 

Employee Information

Employee Name Employee One
[Show Employee Details](#)

Progress Review Information

A progress review should acknowledge achievements to date and suggested areas for improvement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.

Progress Review Initiator Rating Official One
 Progress Review Status Initiated
 Progress Review Number 1

Assessments | Approvals and Acknowledgments

This screen allows you to view your employee's performance elements and standards and input and enter your assessments.

- Select Radio button next to the performance element and standard(s) you want to view and enter assessments
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s).
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select [Need Help?](#)

Performance Elements

| Order | Performance Element Title | Status | Performance Element Type |
|------------------------------------|---------------------------|----------|--------------------------|
| <input checked="" type="radio"/> 1 | Training | Approved | Critical |
| <input type="radio"/> 2 | | Approved | Critical |

Select 'Go Back to Progress Reviews' button

Progress Reviews Tab

TRANSFER TO EMPLOYEE

- Transfer the Progress Review to Employee by selecting the 'drop down' arrow and select 'Transfer to Employee' action from list and select the 'Go' button. (See action list below)

Plan | **Progress Reviews** | Annual Appraisal | Narrative Statements | View/Print Form | Manage Guest Participants

-- Choose an Action --  [Go](#) 

Employee Information

Employee Name Employee One
[Show Employee Details](#)

This screen allows you to create, update or view completed progress reviews. Progress Reviews are performance discussions that must be documented in the MyPerformance tool. Employees must have at least one documented progress review which typically occurs midway through the performance cycle.

- Select Create Progress Review button to create a progress review.
- Select Update button under Action column to update a progress review.
- Select View History button under Action column to view a completed progress review.

For additional guidance, select [Need Help?](#)

| Number | Created By | Creation Date | Higher Level Review Date | Status | Communication Date | Communication Method | Employee Ack Date | Action | Delete |
|--------|---------------------|---------------|--------------------------|-----------|--------------------|----------------------|-------------------|------------------------|---------------------------------------------------------------------------------------|
| 1 | Rating Official One | 23-Aug-2018 | | Initiated | | | | Update |  |

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

Rating Official Notification to Employee Page

11. Enter message to the employee in text box and select 'Transfer to Employee with E-mail Notification' button.

Rating Official Notification to Employee - Employee One

Cancel Transfer to Employee with E-mail Notification Transfer to Employee without E-mail Notification

Message to Employee

Enter message to employee in this block.

12. Confirmation message received: 'The appraisal has been submitted to the employee'.
The employee is currently the owner and you no longer have 'Update' capability and only have 'View'.

MyPerformance Main Page Provide Guest Feedback

Confirmation
The appraisal has been submitted to the employee.

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

| Employee Name ^ | Current Owner ^ | Rating Official Name ^ | Appraisal Year ^ | Appraisal ID ^ | Plan Approval Date ^ | Type ^ | Plan Status ^ | Current Status ^ | Action |
|-----------------|-----------------|------------------------|------------------|----------------|----------------------|--------|---------------|-----------------------------|----------------------------------|
| Employee One | Employee One | Rating Official One | 2019 | 742 | 12-Jul-2018 | DoD | Approved | Progress Review in Progress | View <input type="checkbox"/> Go |

APPROVALS AND ACKNOWLEDGMENTS

The Employee has completed their input for the Progress Review and has 'transferred' the plan/appraisal (Progress Review) back to you.

13. Log into the application:

- Go to DCPDS link: <https://compo.dcpds.cpms.osd.mil/>
- Accept the DoD Notice and Consent Banner
- Select button 'Smart Card Log In'
- Select signature certificate
- Select HR Mybiz+ Tile
- Accept Privacy Statement
- Select Performance Management and Appraisal link located under 'Manager Functions'

MyPerformance Main Page: It's very important that the action column reflects 'Update' for the employee plan/appraisal (Progress Review) you want to document.

14. Select the 'Go' button.

MyPerformance Main Page Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page [Need 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 employee Performance Plans; change the Rating Official and/or Higher Level Reviewer, view and print part or an entire plan after it is created; close a plan, and track the status of a plan. You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan: 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 column
- Select the 'Go' button

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

Plans/Appraisals In Progress

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

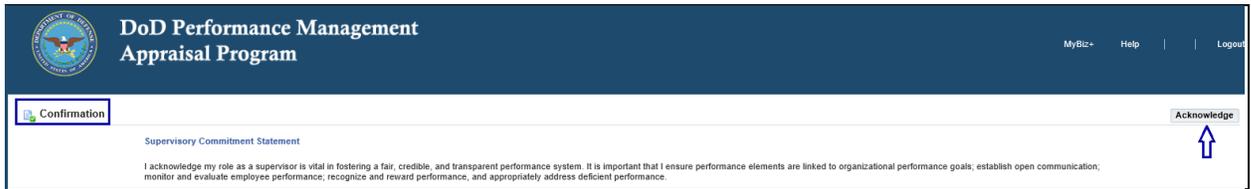
Show Me All Appraisals Appraisal Year ALL

Create New Plan --Choose a Plan Type-- Go

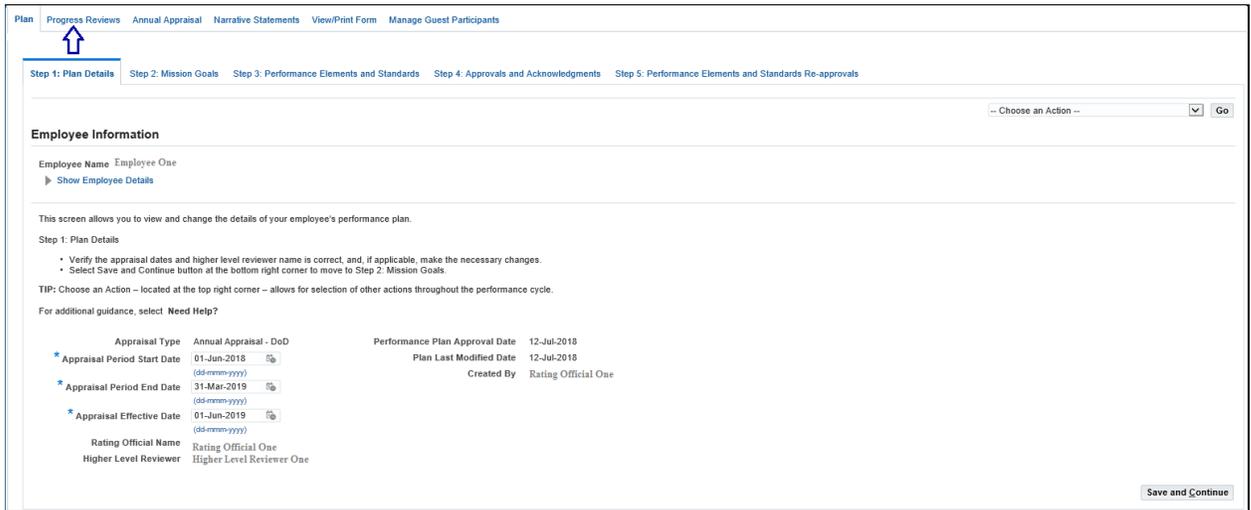
Records Displayed 10 | [Icons]

| Employee Name | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current Status | Action |
|---------------|-----------------|----------------------|----------------|--------------|--------------------|------|-------------|-----------------------------|-------------|
| Employee One | Rating Official | Rating Official One | 2019 | 742 | 12-Jul-2018 | DoD | Approved | Progress Review in Progress | Update [Go] |
| Employee Two | Rating Official | Rating Official Two | 2019 | 788 | 02-Apr-2018 | DoD | Approved | Plan Approved | Update [Go] |

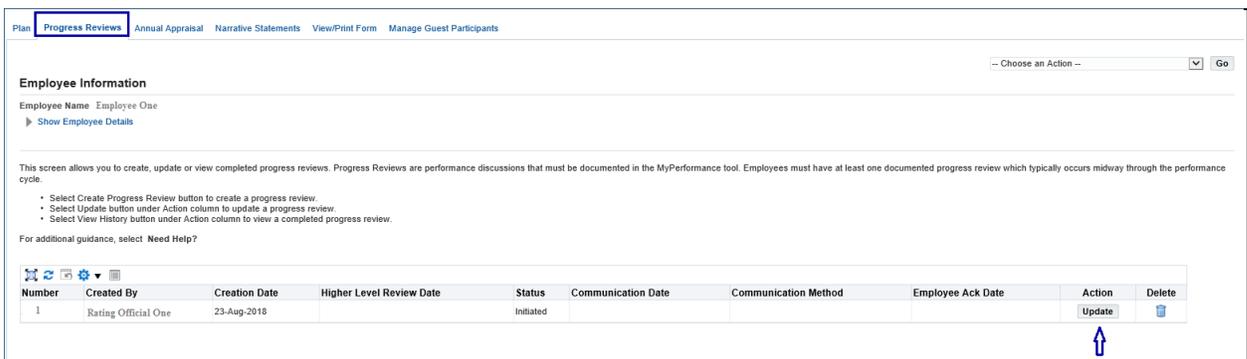
15. Confirmation Message Received: Read the Supervisory Commitment Statement and Select the 'Acknowledge' button.



16. Select the 'Progress Reviews' tab.



17. Select the 'Update' button under the 'Action' column.



Progress Reviews Information Area Page

18. If you wish to review the Employee's input on the Performance Elements, scroll down the page to the 'Employee Input' box for each Element.

Progress Reviews Information area [Go Back to Progress Reviews](#)

Employee Information
Employee Name: Employee One
[Show Employee Details](#)

Progress Review Information
A progress review should acknowledge achievements to date and suggested areas for improvement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.

Progress Review Initiator: Rating Official One
Progress Review Status: Initiated
Progress Review Number: 1

Assessments Approvals and Acknowledgments

This screen allows you to view your employee's performance elements and standards and input and enter your assessments.

- Select Radio button next to the performance element and standard(s) you want to view and enter assessments.
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s).
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select Need Help?

Performance Elements

| Order | Performance Element Title | Status | Performance Element Type |
|----------------------------------|---------------------------|----------|--------------------------|
| <input checked="" type="radio"/> | 1 Training | Approved | Critical |
| <input type="radio"/> | 2 Budget | Approved | Critical |

Performance Element and Standard(s)

Provide training modules to employees for new programs within three weeks of deployment.

Employee Input

I exceeded this element by having training materials, videos, etc., out to the end user at least two days before the deadline. Received positive feedback from customers and surveys all had high marks for an overall 'Exceptional' rating.

19. After you finish reviewing 'Employee Input' for the Performance Elements, select the 'Approvals and Acknowledgments' tab.

Progress Reviews Information area [Go Back to Progress Reviews](#)

Employee Information
Employee Name: Employee One
[Show Employee Details](#)

Progress Review Information
A progress review should acknowledge achievements to date and suggested areas for improvement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.

Progress Review Initiator: Rating Official One
Progress Review Status: Initiated
Progress Review Number: 1

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- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select Need Help?

20. Select the 'Start' button for Step 1. If this step is not required, select 'Start' button to Step 3.

Progress Reviews Information area [Go Back to Progress Reviews](#)

Employee Information
 Employee Name: Employee One
[Show Employee Details](#)

Progress Review Information
 A progress review should acknowledge achievements to date and suggested areas for improvement. The superior and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.
 Progress Review Initiator: Rating Official One
 Progress Review Status: Initiated
 Progress Review Number: 1

Assessments Approvals and Acknowledgments

This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select + icon under Details column to see approval and/or communication information for each step and select - icon to collapse step.
- Select Start button under Action column for Steps 1 (if required) or 3, if available.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select Need Help?

Show All Details | Hide All Details

| Details | Tasks | Status | Action |
|---------|---------------------------------------------------------------------------------|-------------|--------------------------|
| + | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Not Started | Start |
| + | Step 2: Higher Level Reviewer - Review (if required) | Not Started | Not Started |
| + | Step 3: Rating Official - Document Communication to Employee | Not Started | Start |
| + | Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Progress Reviews Information Area Page

Step 1: Rating Official – Request or Document Higher Level Review, if required. There are two options for this step and they are as follows:

Option A – Transfer to the Higher Level Reviewer (this options transfers the plan/appraisal (Progress Review) to the HLR for their action)

- Enter message to HLR in text box and select the 'Transfer to Higher Level Reviewer with or without E-mail Notification' button
- You will receive a Confirmation (the appraisal has been submitted to the Higher Level Reviewer)
- The HLR owns plan/appraisal (Progress Review) and you only 'View' under 'Action' column
- The Current Status will be 'Progress Review Pending HLR Approval'

Option B – Document the higher level review has taken place by entering the following information (this option allows you to manually document the review of progress review that took place with HLR)

- Higher Level Reviewer Name Auto Populates (no action needed)
- Review Date (this is the date review took place between you and the HLR)
- Method of Review (what was the method used for review, i.e., Face to Face, Telephone and Other)
- Select 'Save' button to complete the HLR step

If the HLR Step Not Required (see Step 21 on page 10)

Employee Information

Employee Name Employee One
[Show Employee Details](#)

Progress Review Information

A progress review should acknowledge achievements to date and suggested areas for improvement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards.

Progress Review Initiator Rating Official One
Progress Review Status Initiated

Progress Review Number 1

Assessments Approvals and Acknowledgments

This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select icon under Details column to see approval and/or communication information for each step and select icon to collapse step.
- Select Start button under Action column for Steps 1 (if required) or 3, if available.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select [Need Help?](#)

[Show All Details](#) | [Hide All Details](#)

Details Tasks

| Task | Status | Action |
|---------------------------------------------------------------------------------|-------------|-----------------------|
| Step 1: Rating Official - Request or Document Higher Level Review (if required) | Not Started | Start |

[TIP](#) There are two options available to complete this step. If you are both the rating official and higher level reviewer, use Option B to document the approval.

Option A - Transfer to the Higher Level Reviewer

| Name | Title |
|---------------------------|-----------------------|
| Rating Official One | Rating Official |
| Higher Level Reviewer One | Higher Level Reviewer |

[TIP](#) Please select new HLR from list of values, if required.

Change Higher Level Reviewer Higher Level Reviewer One

Message to Higher Level Reviewer

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

[Spell Check](#)

Notice: You are about to contact Higher Level Reviewer One 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.

[Cancel](#) [Transfer to Higher Level Reviewer without E-mail Notification](#) [Transfer to Higher Level Reviewer with E-mail Notification](#)

Option B - Document the higher level review has taken place by entering the following information

Higher Level Reviewer Higher Level Reviewer One
Review Date (dd-mm-yyyy)

Method of Review
Other Method

[Cancel](#) [Save](#)

21. Select the 'Start' button for Step 3: Rating Official – Document Communication to Employee

Assessments Approvals and Acknowledgments

This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select icon under Details column to see approval and/or communication information for each step and select icon to collapse step.
- Select Start button under Action column for Steps 1 (if required) or 3, if available.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

For additional guidance, select [Need Help?](#)

[Show All Details](#) | [Hide All Details](#)

| Task | Status | Action |
|---------------------------------------------------------------------------------|-------------|--------------------------|
| Step 1: Rating Official - Request or Document Higher Level Review (if required) | Not Started | Start |
| Step 2: Higher Level Reviewer - Review (if required) | Not Started | Start |
| Step 3: Rating Official - Document Communication to Employee | Not Started | Start |
| Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Communication Date (dd-mm-yyyy)

Communication Method

Other

[Cancel](#) [Save and Transfer to Employee for Acknowledgment](#) [Save and go to Step 4](#)

22. Enter the Communication Date (e.g., 01-Oct-2018). This is the date the progress review was communicated to employee (can be a past date).

23. Identify the Communication Method – Select the drop down arrow and select method from list (e.g., Select ‘Other’ from list and enter ‘Fax’ in the ‘Other’ block).

24. Action Buttons:

- a. **Cancel** – returns you to previous page
- b. **Save and Transfer to Employee for Acknowledgment** – transfer the progress review to the employee for them to acknowledge
- c. **Save and go to Step 4** – if the employee is unavailable to acknowledge their progress review, select this button and you will need to complete Step 4 (Rating Official – Document Employee Acknowledgment)

25. For this step, select the ‘Save and Transfer to Employee for Acknowledgment’ button.

26. Rating Official Notification to Employee: Enter message and select the ‘Transfer to Employee with E-mail Notification’ button.

27. Confirmation message received:

You will have ‘View’ only to the plan/appraisal until such time the Employee Transfers it back to you.