# MyPerformance Tool Rating Official Progress Review Guide:

Create, Transfer to Employee, and Approval and Acknowledgment

Go to DCPDS link: <a href="https://compo.dcpds.cpms.osd.mil/">https://compo.dcpds.cpms.osd.mil/</a>

- 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.

MyPerformance Main Pag	e Provide Guest Feedback										
Rating Official/H	ligher Level Review	ver									
				MyPerf	formance Main Pag	ge					
										Need I	lelp?
	<b>Warning</b> Unauthor	: This application is design ized release of classified	gned for sensitive information is a vi	unclassified per olation of law a	rsonnel information on Ind may lead to prosed	nly. Do NG cution.	)T enter classi	fied information in t	his system.		
From the Main Page, you	can create, update and view of	mployee Performance Plans; cha	inge the Rating Official a	and/or Higher Level F	Reviewer; view and print part	or an entire	plan after it is creat	ed; close a plan, and trac	k the status of a plan.		
You can also search for c	ompleted plans by selecting th	e 'Show Completed Plans/Apprais	sals' link located at the t	oottom of this page.							
To create a Performance	Plan: To com	plete other actions described abo	ve:								
<ul> <li>Select 'Choose a</li> <li>Select 'Appraisal</li> </ul>	Plan Type' • Plan Type'	Select an option from the Action of	column								
<ul> <li>Select the 'Go' bu</li> </ul>	tton •	Select the 'Go' button									
Important: To become fa	miliar with the columns, select	the 'Need Help?' link.									
Plans/Appraisals I	n Progress										
CTID Only Employees	that have a plan in progress a	re listed below.									
V IP OIIIV EIIIDIOVEES	Create New Plan										
W THP Only Employees		CARLE DOTE									
Show Me All Appraisa	ls 🔽 Appraisa	I Year ALL						Choos	e a Plan Type	~	Go
Show Me All Appraisa Records Displayed 10	is 🔍 Appraisa	I Year ALL 💌						Choos	e a Plan Type	~	Go Rows 1 to 26
Show Me All Appraisa Records Displayed 10 Employee Name △	Is ▼ Appraisa ▼   [2] 2	I Year ALL 💌	Appraisal Year 🛆	Appraisal ID 🗠	Plan Approval Date 🛆	Туре 🛆	Plan Status △	-Choos	e a Plan Type Action	Y	Go Rows 1 to 26
Show Me All Appraise Records Displayed 10 Employee Name Employee One	Is ▼ Appraisa ↓ ☆ ☆ ☆ ↓ Current Owner △ Rating Official	I Year ALL 🔍 Rating Official Name 🛆 Rating Official One	Appraisal Year A	Appraisal ID A	Plan Approval Date A	Type △ DoD	Plan Status Approved	Current Status A	e a Plan Type Action Update	v	Go Rows 1 to 26 Go 🗲

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

	DoD Performance Management Appraisal Program	MyBiz+	Help	I	I	Logoul
Confirmation				A	cknowl	edge
	Supervisory Commitment Statement				Û	
	I acknowledge my role as a supervisor is vital in fostering a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals; establish communication, monitor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	sh open				

3. Select the 'Progress Reviews' tab.

Plan Progress Reviews Annual Appra	isal Narrative Statements View/Pr	int Form Manage Guest Participants			
Step 1: Plan Details Step 2: Missio	n Goals Step 3: Performance Eleme	ents and Standards Step 4: Approvals and	Acknowledgments Step 5: Performance Elements and Standards Re-approvals		
				Choose an Action	♥ Go
Employee Information					
Employee Name Employee One					
Show Employee Details					
This screen allows you to view and o Step 1: Plan Details • Verify the appraisal dates an • Select Save and Continue bu TIP: Choose an Action – located at th For additional guidance, select Neer	hange the details of your employee's p d higher level reviewer name is correct, tion at the bottom right corner to move he top right corner – allows for selection d Help?	erformance plan. and, if applicable, make the necessary chan to Step 2: Mission Goals. n of other actions throughout the performanc	nges. e cycle.		
Appraisal Type	Annual Appraisal - DoD	Performance Plan Approval Date	12-Jul-2018		
* Appraisal Period Start Date	01-Jun-2018 🐞	Plan Last Modified Date	12-Jul-2018		
* Appraisal Period End Date	(dd-mmm-yyyy) 31-Mar-2019 (b) (dd-mmm-yyyy)	Created By	Rating Official One		
* Appraisal Effective Date	01-Jun-2019				
Rating Official Name	Rating Official One				
Higher Level Reviewer	Higher Level Reviewer One				
					Save and <u>C</u> ontinue

4. Select the 'Create Progress Review' button.

Plan Progress Review	Annual Appraisa	Narrative Statements	View/Print Form Manage Guest Participant	5					
							Choose an Ac	tion	✓ G0
Employee Inform	ation								
Employee Name Empl	oyee One								
Show Employee De	ails								
This screen allows you to performance cycle.	o create, update or vi	ew completed progress re	eviews. Progress Reviews are performance disc	ussions that m	ust be documented in the MyPerforma	ance tool. Employees must have at least	one documented progress review v	which typically occ	curs midway through the
Select Create Pre	gress Review button	to create a progress revi	ew.						
<ul> <li>Select Update bu</li> <li>Select View Histo</li> </ul>	tton under Action col ry button under Actio	umn to update a progress n column to view a comp	s review. leted progress review.						
For additional guidance,	select Need Help?								
							Create Progress Rev	/iew   💢 😂	- 🌣 🗕 🖩
Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
No results found.								-	

#### 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.

A progress review should acknowledge ach Progress Review Initiator Ratin; Progress Review Status Initiate Assessments Approvals and Acknowled This screen allows you to view your e • Select Radio button next to th • Select Radio button next to th	evements to date and suggested areas for Official One gments sployee's performance elements and stan performance element and standar(d) yo	r improvement. The supervisor and employe Progress Review ndards and input and enter your assessment	e should engage in meaningful communications throughour Number 1	ut the appraisal cycle to assess performance against the performance elemen
Progress Review Initiator Ratin Progress Review Status Initiate Assessments Approvals and Acknowlew This screen allows you to view your e • Select Radio button next to th • Select Ga to Next Performanc	Official One gments nployee's performance elements and star performance element and standard(s) yr	Progress Review	v Number 1	
Progress Review Status Initiate Assessments Approvals and Acknowlee This screen allows you to view your e - Select Radio button next to th - Select Go to Next Performance	g <mark>ments</mark> npioyee's performance elements and star performance element and standard(s) y	ndards and input and enter your assessment	10	
Assessments Approvals and Acknowler This screen allows you to view your e Select Radio button next to th Select Go to Next Performance	gments nployee's performance elements and star performance element and standard(s) yo	ndards and input and enter your assessment	te .	
This screen allows you to view your e <ul> <li>Select Radio button next to th</li> <li>Select Go to Next Performance</li> </ul>	nployee's performance elements and star performance element and standard(s) yo	ndards and input and enter your assessment	te	
Select Radio button next to th     Select Go to Next Performance	performance element and standard(s) yo		80°.	
<ul> <li>Select Go to Next Performance</li> </ul>		ou want to view and enter assessments.		
<ul> <li>Select Go Back to Top of Pag</li> </ul>	Element button at bottom right corner to button at bottom right corner to go back.	go to the next performance element and sta	andard(s).	
<ul> <li>Select Approvals and Acknow</li> </ul>	edgments tab to go to Approvals and Ack	nowledgments page.		
<ul> <li>Select Go Back to Progress R</li> </ul>	views button at top right corner to go bac	to Progress Reviews page.		
For additional guidance, select Need	Help?			
Desfermence Elemente				
Fenomance Elements				
1 2 5 😳 - III				
Order Performance	Element Title	Status	Performance Element Type	
1 Training		Approved	Critical	
O 2 Budget		Approved	Critical	
Performance Element and S	andard(s)			
Provide training modules to en	ployees for new programs within thre	ee weeks of deployment.		

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

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

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.

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

8. 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**

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

Progress Reviews Information area											
Employee Information			go Back to Progress Reviews								
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 Review Status Initiate Progress Review Number 1											
Assessments Approvals and Acknowledgments	Assessments Approvals and Acknowledgments										
This screen allows you to view your employee's performance elements and Select Radio button next to the performance element and standard(s Select Oo how Terformance Element button at bottom right come Select Oo Back to Too Page button at bottom right come to go b Select Oo Back to Pogress Reviews button at bottom right come to go Select Oo Back to Pogress Reviews button at bottom right come to go For additional guidance, select Need Hetp? Performance Elements	Assessment         Approvals and Acknowledgments           This screen allows you to view your employee's performance elements and standards and input and enter your assessments.         Select Radio buttom next to the performance element and standards you wund enter assessments.           • Select Radio buttom next to the performance element and standards you wund enter assessments.         Select Go Back to Top of Page buttom a bottom right corner to go to hane you for performance element and standard(s).           • Select Go Back to Top of Page buttom a bottom right corner to go to back to the top of the page.         Select Gor Back to Top of Page buttom a bottom right corner to go back to the Pogress Reviews page.           • Select Gor Back to Top of Page buttom a bottom right corner to go back to the Pogress Reviews page.         Select Gor Back to Top of Page buttom at top tight corner to go back to the Pogress Reviews page.           • Select Gor Back to Top of Page buttom at top tight corner to go back to the Pogress Reviews page.         Select Gor Back to Top of Page buttom at top tight corner to go back to Pogress Reviews page.           • Select Gor Back to Top of Page buttom at top tight corner to go back to Pogress Reviews page.         Select Gor Back to Pogress Reviews page.           • Select Gor Back to Pogress Reviews page.         Select Gor Back to Pogress Reviews page.         Select Gor Back to Pogress Reviews page.										
₩2500.	21.4										
Order Performance Liement Ittle     1 Training	Approved	Performance Element Type									
0 2	Approved	Critical									

Select 'Go Back to Progress Reviews' button

**Progress Reviews Tab** 

## TRANSFER TO EMPLOYEE

10. 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)





## **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 Emplo	yee with E-mail Notification	Transfer to Employee without E-mail Notification
Message to Employee		Û	
Enter message to employee in this block.			

 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/Hig	Rating Official/Higher Level Reviewer											
MyPerformance Main Page												
										Need Help?		
Employee Name 🛆	Current Owner 스	Rating Official Name 🛆	Appraisal Year 🛆	Appraisal ID 🗠	Plan Approval Date 🛆	Туре 🛆	Plan Status 스	Current Status 🛆	Action			
Employee One	Employee One	Rating Official One	2019	742	12-Jul-2018	DoD	Approved	Progress Review in Progress	View	▼ 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/Higl	ner Level Review	er								
				MyPerf	ormance Main Pag	ge				
										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 en	nployee Performance Plans; cha	inge the Rating Official	and/or Higher Level F	Reviewer; view and print part	or an entire	plan after it is crea	ated; close a plan, and tr	ack the status of a plan.	
You can also search for comp	leted plans by selecting the	Show Completed Plans/Apprai	sals' link located at the I	oottom of this page.						
To create a Performance Plar	: To comp	lete other actions described abo	ve:							
<ul> <li>Select 'Choose a Plan</li> <li>Select 'Appraisal Plan</li> </ul>	Type' • S Type'	elect an option from the Action	column							
Select the 'Go' button	• S	elect the 'Go' button								
Important: To become familia	r with the columns, select t	he 'Need Help?' link.								
Plans/Appraisals In P	rogress									
TIP Only Employees that	have a plan in progress are	e listed below.								
Chaur Ma All Appreciaals	NV Annuinal	Mana ALL M							Create New Plan	1
Show we All Appraisais		Teal ALL						Cho	ose a Plan Type	✓ G0
Records Displayed 10	I 🗮 😂 🖬 🏟 🕶 🖩	]								Rows 1 to 26
Employee Name 🛆	Current Owner $ riangleq$	Rating Official Name $ riangle$	Appraisal Year 🛆	Appraisal ID 🛆	Plan Approval Date 🛆	Туре 🛆	Plan Status $ riangle$	Current Status $ riangle$	Action	
Employee One	Rating Official	Rating Official One	2019	742	12-Jul-2018	DoD	Approved	Progress Review in P	rogress	🗸 🖌 🗸
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.

	DoD Performance Management Appraisal Program	tyBiz+	Help			ogou
Confirmation				Ac	knowled	ge
	Supervisory Commitment Statement				₽	
	I acknowledge my role as a supervisor is vital in fostering a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals, establish open commur monitor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	nication;				

# 16. Select the 'Progress Reviews' tab.

p 1: Plan Details Step 2: Missio	n Goals Step 3: Performance Ele	ements and Standards Step 4: Approvals and	d Acknowledgments Step 5: Performance Elements and Standards Re-approvals		
				Choose an Action	V
nployee Information					
mployee Name Employee One					
Show Employee Details					
<ul> <li>Varify the appraisal datas appreciate</li> </ul>	higher level reviewer name is corr	act and if applicable make the persenant char	0700		
Verify the appraisal dates and Select Save and Continue bu TP: Choose an Action – located at th or additional guidance, select Need	I higher level reviewer name is corru tton at the bottom right corner to mo ne top right corner – allows for selec I Help?	ect, and, if applicable, make the necessary char ve to Step 2: Mission Goals. :tion of other actions throughout the performanc	nges. ze cycle.		
Verify the appraisal dates and Select Save and Continue bu IP: Choose an Action – located at th or additional guidance, select Need Appraisal Type	I higher level reviewer name is corrr tton at the bottom right corner to mo ne top right corner – allows for selec I Help? Annual Appraisal - DoD	ect, and, if applicable, make the necessary char ve to Step 2. Mission Goals. Sion of other actions throughout the performanc Performance Plan Approval Date	nges. ce cycle. 12-Jul-2018		
Verify the appraisal dates and     Select Save and Continue bu     IP: Choose an Action – located at th     or additional guidance, select Neece     Appraisal Type     * Appraisal Period Start Date	I higher level reviewer name is corrr tion at the bottom right corner to me te top right corner – allows for select I Help? Annual Appraisal - DoD 01-Jun-2018 5	ect, and, if applicable, make the necessary chai we to Step 2: Mission Goals. Etion of other actions throughout the performance Performance Plan Approval Date Plan Last Modified Date	nges. 22-Jul-2018 12-Jul-2018		
Vorfry the appraial dates an Select Save and Continue bu IP: Choose an Action – located at th for additional guidance, select Neec Appraisal Type Appraisal Period Start Date Appraisal Period End Date	higher level reviewer name is corr titen at the bottom right corner to mic ee top right corner – allows for select Help? Annual Appraisal - DoD 01-Jun-2018 5 (dsmmm-yyy) 31-Mar-2019 5 (dsmmm-yyy)	ect and, if applicable, make the necessary char we to Step 2. Mission Goals. Sion of other actions throughout the performance Performance Plan Approval Date Plan Last Modified Date Created By	nges. 22-Jul-2018 12-Jul-2018 Rating Official One		
Verify the appraisal dates an Select 3xe and Continue built IP: Choose an Action – located at II or additional guidance, select Neece Appraisal Type Appraisal Period Start Date Appraisal Effective Date	higher kevel reviewer name is com tion at the boltom right comer to mo te lop right comer or allows for select I Help? Annual Appraisal - DoD 01-Jun-2018 % (demmery) 31-Marc2019 % (demmery) 01-Jun-2019 % (demmery) 01-Jun-2019 %	ect, and, if applicable, make the nacessary char we to Step 2. Mission Goals. Stion of other actions throughout the performance Performance Plan Approval Date Plan Last Modified Date Created By	nges. 2e cycle. 12-Jul-2018 12-Jul-2018 Rating Official One		
Verity the appraisal dates an Select Save and Continue Wo 1P: Choose an Action - located at ti or additional guidance, select Neece Appraisal Type * Appraisal Period Start Date * Appraisal Period End Date Appraisal Effective Date Rating Official Name	higher level reviewer name is com tion at the bottom right corner to un too at the bottom right corner to un to pright corner – allows for select Help? Annual Appraisal - DoD 01-Jun-2018 (disformany)) 01-Jun-2019 (disformany)) 01-Jun-2019 (disformany))	ect, and, if applicable, make the necessary char we to Step 2. Machine Goals. Hion of other actions throughout the performance Performance Plan Approval Date Plan Last Modified Date Created By	nges. 2e cycle. 12-Jul-2018 12-Jul-2018 Rating Official One		

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

Plan Progre	ss Reviews Annual Apprai	sal Narrative Statements	View/Print Form Manage Guest Partici	pants						
							Choose a	n Action	[	✓ Go
Employee	Employee Information									
Employee Na	me Employee One									
Show En	ployee Details									
This screen a cycle. • Select • Select • Select	lows you to create, update or Create Progress Review but Update button under Action View History button under A- guidance, select Need Help	view completed progress in ton to create a progress rev column to update a progres ction column to view a com ?	eviews. Progress Reviews are performance liew. s review. pleted progress review.	discussions that mu:	st be documented in the MyPerform	ance tool. Employees must have at least on	e documented progress review which by	ically occurs midway th	rough the perfe	ormance
1 2 5	<b>⇔ • •</b>									
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		
								Û		

## **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 R	rogress Reviews Information area					
					Go Back to Progress Reviews	
Employee Inf	ormatio					
Employee Nam	Employ	e One				
Show Employee	yee Details					
Progress Rev	view Info	rmation				
A progress revie	w should ad	mowledge achievements to date and suggested areas for improvem	ent. The supervisor and employee should engage	a in meaningful communications throughout the appraisal cycle to asses	is performance against the performance elements and standards.	
Progress	s Review In as Review S	tatus Initiated	Progress Review Number 1			
Assessments	Approvals	and Acknowledgments				
This sore	en allows y elect Radio elect Go to elect Go Ba elect Appro elect Go Ba ional guidar	w to view your employee's performance elements and standards and outlon next to the performance element and takadard(s) you want to del Performance element button at bottom late (contre) togo to bask la to Togo (Page) tutton at bottom right contre togo togo to the togo kit to Progress Reviews button at togo right contre togo bask to Progress reviews button at togo right contre togo bask to Progress reviews the Help?	d input and enter your assessments. view and enter assessments. next performance element and standerd(s). of the page. ress Reviews page.			
	<b></b>					
10 K	Order	Performance Element Title	Status	Performance Element Type		
۲	1	Training	Approved	Critical		
0	2	Budget	Approved	Critical		
Performa	ince Elei	nent and Standard(s)				
Prov	ide traini	g modules to employees for new programs within three	weeks of deployment.			
Employe	e Input					
I ex Rec	ceeded thi eived posi	s element by having training materials, videos, etc., out ive feedback from customers and surveys all had high n	to the end user at least two days before narks for an overall "Exceptional" rating.	the deadline.		

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 adnowledge achievements to date and suggested areas for improvement. The supervisor and engages in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standards. Progress Review Number 1 Progress Review Status Initiated Progress Review Number 1	
Assessments Approvals and Advonvelegements	
This screen allows you to view your employee's performance elements and standards and input and enter your assessments.      Bedie Radio Multion read to the performance demont and standards and input and enter your assessments.  Bedie Co So Haart Performance Demont during the control op schedule element and standards(s).  Bedie Co So Haart Performance Demont during the control op schedule element and standards(s).  Bedie Approvale and Actional/Software and Activity and Activity approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule Approvale approx.  Bedie Approvale and Activity for control op schedule Approvale approx.  Bedie Approvale and Activity for control op schedule Approvale approx.  Bedie Approvale and Activity for control op schedule Approvale approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule Approvale approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for control op schedule approx.  Bedie Approvale and Activity for and approx.  Bedie Approvale and Activity for approx.  Bedie Approvale and Activity for and approx.  Bedie Approvale and Activity for and approx.  Bedie Approvale and Activity for approx.  Bedie Approvale and Activity for approx.  Bedie Approvale and Activity for and approx.  Bedie Approvale and	
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.

rogre	ss Reviews Information area				
					Go Back to Progress Reviews
nploy	ee Information				
mploye	e Name Employee One v Employee Details				
ogres	s Review Information				
progres	is review should acknowledge achievements to date and suggested areas for improvement. The s	upervisor and employee should engage in meaningful communications	throughout the appraisal cycle to asses	s performance against the performance elements ar	nd standards.
P	rogress Review Initiator Rating Official One Progress Review Status Initiated	Progress Review Number 1			
ssessm	ents Approvals and Acknowledgments				
T	his screen allows you to start the approval and/or communication process or view status informati status and a start of the start of t	on of the employee's progress review. Is link to collapse all steps, ach step and select <i>I</i> icon to collapse step. was page.			
	2 · • • • •				
Sho	w All Details   Hide All Details		Statur	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	
Þ	Step 3: Rating Official - Document Communication to Employee		Not Started	Start	

#### **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)

loyee Ir	ntormation						
oloyee Nar	me Employee One						
Show Emp	ployee Details						
jress Re	eview Information						
ogress revi	view should acknowledge achievements to date and suggested	d areas for improvement. The supervisor and	employee should engage in meaning	ngful communications throu	ghout the appraisal cycle to	assess performance against the perform	nance elements and stand
Progre	ess Review Initiator Rating Official One	Progres	s Review Number 1				
Progr	ress Review Status Initiated	riogics					
	Annual and Ashmudadamata						
essments	Approvais and Acknowledgments						
This so	creen allows you to start the approval and/or communication p	rocess or view status information of the emp	loyee's progress review.				
:	Select Show All Details link to see status information (date, m Select > icon under Details column to see approval and/or or	nethod, etc.) and Hide All Details link to colla ommunication information for each step and s	pse all steps. select ∡ icon to collapse step.				
:	Select Start button under Action column for Steps 1 (if requir Select Go Back to Progress Reviews button at top right corner	ed) or 3, if available. er to go back to Progress Reviews page.					
For add	ditional guidance, select Need Help?						
1 2	<b>□</b> ☆ ▼ Ⅲ						
Show All [	Details   Hide All Details						
Details T	Tasks			Status	Action		
A 9	Step 1: Rating Official - Request or Document Higher Level Re	eview (if required)		Not Started	Start		
Ст	TIP There are two options available to complete this step. If yo	u are both the rating official and higher level	reviewer, use Option B to document	the approval.			
⊗T 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer	u are both the rating official and higher level	reviewer, use Option B to document	the approval.			
⊗T 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name	u are both the rating official and higher level Tř	reviewer, use Option B to document	the approval.			
⊗⊤ o	IIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Hisher Level Reviewer One	u are both the rating official and higher level Tri Ra Higher Law	reviewer, use Option B to document tte ting Official e Reviewer	the approval.			
<b>⊘</b> ⊺	IIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One IV Please select new HLR from list of values, if req	u are both the rating official and higher level Tri Re Higher Leve	reviewer, use Option B to document tie ding Official al Reviewer	the approval.			
ØT O	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One ©TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Higher Level Reviewer	u are both the rating official and higher level Tri R Higher Lev unired.	reviewer, use Option B to document tile ding Official al Reviewer	the approval.			
0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One Change Higher Level Reviewer Higher Level Reviewer Change Higher Level Reviewer Higher Level Reviewer	u are both the rating official and higher level 177 R Higher Lev Luired. Xiewer One X Q	reviewer, use Option B to document tle ting Official al Reviewer	the approval.			
0 O	TIP There are two options available to complete this step. If yo option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One Grange Higher Level Reviewer Higher Level Rev Message to Higher Level Reviewer	u are both the rating official and higher level Tri Ra Higher Lev uired. viewer Once 3 Q	reviewer, use Option B to document te ting Official Il Reviewer	the approval.			
0	IP There are two options available to complete this step. If yo option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One Other Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level	u are both the rating official and higher level Tri Ra Higher Lev viewer One <u>J</u> Q	reviewer, use Option B to document te ting Official al Reviewer vec's Progress Review, After writing	the approval.	anafer to Hisher Level Revise	iewer with E-mail Notification' button to	vend the message.
0 0	IP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One ⊘TP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level	u are both the rating official and higher level Tr Ra Higher Lew uried. viewer One <u>J</u> Q	reviewer, use Option B to document te ting Official al Reviewer vee's Progress Review. After writing	the approval.	ansfer to Higher Level Revie	iewer with E-mail Notification' button to :	end the message.
0 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One © TIP Flease select new HLR tom list of values. If req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level New State S	u are both the rating official and higher level Tri Ra Higher Lev uirred. viewer One <u>J</u> Q. viewer a message regarding an employ	reviewer, use Option B to document the ang Official al Reviewer	the approval. the message, select the $\tau_{\rm f}$	anafer to Higher Level Revie	iewer with E-mail Notification' button to a	end the message.
©T 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One © TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level New State S	u are both the rating official and higher level Tri Re Higher Lev uirad. viewer One <u>J</u> Q	reviewer, use Option B to document te fing Official al Reviewer	the approval.	ansfer to Higher Level Revie	iewer with E-mail Notification' button to a	iend the message.
©T 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One ≪ TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level	u are both the rating official and higher level Tr Rev Higher Lev uired. vel Reviewer a message regarding an employ	reviewer, use Option B to document te infing Official al Reviewer yee's Progress Review. After writing	the approval.	ansfer to Higher Level Revie	iewer with E-mail Noëffoation' button to s	end the message.
0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One ♥ TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level	u are both the rating official and higher level 177 R Higher Lev Unred. viewer One <u>J</u> Q	reviewer, use Option B to document te infing Official al Reviewer yee's Progress Review. After writing Spell Check	the approval.	ansfer to Higher Level Revi	iewer with E-mail Notification' button to a	end the message.
0 0	IP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer  Name Rating Official One Higher Level Reviewer One	u are both the rating official and higher level Tri Re Higher Lev uired. vel Reviewer a message regarding an employ	reviewer, use Option B to document tie ing Ottical al Reviewer vee's Progress Review. After writing Spell Check	the approval.	anafer to Higher Level Revie	iewer with E-mail Notification' button to a	end the message.
0 O	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One © TP Please select new HICK from list of values. If req Change Higher Level Reviewer Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level Notice: You are about to contact Higher Level Reviewer One by	u are both the rating official and higher level Tri Ra Higher Lev upred. viewer One <u>J</u> Q. viewer One <u>J</u> Q.	reviewer, use Option B to document tern Official al Reviewer vee's Progress Review. After writing Spell Check e-mail communication, please do r	the approval. the message, select the "Tr	ansfer to Higher Level Revie formation such as social se	iewer with E-mail Notification' button to a	end the message. n in your e-mail.
0 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One In Please select new HAT from 16 of values. If req Change Higher Level Reviewer Message to Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level Notice: You are about to contact Higher Level Reviewer Oas by	u are both the rating official and higher level Tri Ra Higher Lev uired. viewer One <u>si</u> Q. viewer One <u>si</u> Q.	reviewer, use Option B to document tite ting Official al Reviewer yee's Progress Review. After writing Spell Check s e-mail communication, please do r Cancel Transfer to Hi	the approval. the message, select the "Tr not include any non-public in gher Level Reviewer with	ansfer to Higher Level Revie formation such as social se	iewer with E-mail Notification' button to a sourity numbers or privacy act informatic Transfer to Higher Level Reviewer v	end the message. n in your e-mail. ith E-mail Notification
	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Name Rating Official One Higher Level Reviewer One © TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level Notice: You are about to contact Higher Level Reviewer Oas by Dotion B - Document the higher level reviewer was taken aba	u are both the rating official and higher level Tri Re Higher Lev uried. viewer One <u>se</u> Q	reviewer, use Option B to document ting Official al Reviewer rea's Progress Review. After writing Spell Check a e-mail communication, please do r Cancel Transfer to Hi	the approval. the message, select the Tr not include any non-public in <b>oher Level Reviewer with</b>	ansfer to Higher Level Revie formation such as social se	iewer with E-mail Notification' button to s sourity numbers or privacy act informatic <b>Transfer to Higher Level Reviewer v</b>	iend the message. In in your e-mail. Ith E-mail Notification
@T 0	TIP There are two options available to complete this step. If yo Option A - Transfer to the Higher Level Reviewer Rating Official One Higher Level Reviewer One © TIP Please select new HLR from list of values, if req Change Higher Level Reviewer Message to Higher Level Reviewer This screen provides space for you to send a Higher Level Notice: You are about to contact Higher Level Reviewer One by Defion B - Document the higher level review has taken place	u are both the rating official and higher level Tri Re Higher Lev uired. vel Reviewer 0 ne Q ] vel Reviewer a message regarding an employ e-mail. Due to the unencrypted nature of this ce by entering the following information	reviewer, use Option B to document te fing Official al Reviewer ree's Progress Review. After writing Spell Check s e-mail communication, please do r Cancel Transfer to Hi	the approval. the message, select the 'Tr hot include any non-public in gher Level Reviewer witho	ransfer to Higher Level Revie formation such as social se	iewer with E-mail Notification' button to : nourity numbers or privacy act informatic <b>Transfer to Higher Level Reviewer v</b>	iend the message. n in your e-mail. rith E-mail Notification
0	IIP There are two options available to complete this step. If yo Dption A - Transfer to the Higher Level Reviewer  Rating Official One Higher Level Reviewer One Official One Higher Level Reviewer Higher Level Reviewer  Message to Higher Level Reviewer  This screen provides space for you to send a Higher Level Notice: You are about to contact Higher Level Reviewer One by Dption B - Document the higher level review has taken plan  Higher Level Reviewer	u are both the rating official and higher level Tr R Higher Lev Luired. vel Reviewer One Q vel Reviewer a message regarding an employ re-mail. Due to the unencrypted nature of this ce by entering the following information trister Ose Q	reviewer, use Option B to document te info Official al Reviewer yee's Progress Review. After writing Spell Check s e-mail communication, plesse do r Cancel Transfer to His Method of Review	the approval. the message, select the Tr not include any non-public in gher Level Reviewer witho	ansfer to Higher Level Revi formation such as social se	iewer with E-mail Notification' button to s sourity numbers or privacy act information <b>Transfer to Higher Level Reviewer v</b>	and the message. n in your e-mail. tith E-mail Notification

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

ecoment	Approvals and Approviation				
	Approvals and Acknowledgments				
This s	creen allows you to start the approval and	for 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 se	e approval and/or communication information for each step and select 4 icon to collapse	step.		
	Select Start' button under Action column Select Go Beck to Progress Reviews bu	for Steps 1 (if required) or 3, if available.			
	Celebrico Dable to Fragress Reviews bu	ton at top right contento go back to h ogress ricenters page.			
For a	Iditional guidance, select Need Help?				
n 2	5 <b>0</b> v III				
Show Al	Details   Hide All Details				
Details	Tasks			Status	Action
•	Step 1: Rating Official - Request or Docu	nent Higher Level Review (if required)		Not Started	Start
•	Step 2: Higher Level Reviewer - Review (	f required)		Not Started	Not Started
4	Step 3: Rating Official - Document Comm	unication to Employee		Not Started	Start
		Communication Date			
		(dd-mmm-yyyy)			
		Communication Method			
		Other			
			Cancel Save a	and Transfer to Employee	for Acknowledgment Save and go to Step 4
Þ	Step 4: Rating Official - Document Emplo	vee Acknowledgment		Not Started	Step 3 must be completed

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. <u>Cancel</u> returns you to previous page
  - b. <u>Save and Transfer to Employee for Acknowledgment</u> transfer the progress review to the employee for them to acknowledge
  - c. <u>Save and go to Step 4</u> 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.

This	I soreen allows you to start the approval and/or communication process or view status information of the employee's progress review. Select Show AID Details link to see status information (site, method, etc.) and Hole AID Details link to collegee all steps. Select Show ADD Details link to see status information (site, method, etc.) and Hole AID Details link to collegee all steps. Select Show ADD moder Addina column to see approval and/or communication information for each step and select is not oclapse step. Select Show ADD moder Addina column to Steps 1 (frequency of, if we adding. Select Show ADD moder Addina column to Steps 1 (frequency of, if we adding. Select Show ADD moder Addina column to Steps 1 (frequency of, if we adding. Select Show ADD moder Addina adding to report to set and the progress Reviews page. additional guidance, setter. Heed Heef?				
11 2	ž © ‡ ▼ III				
Show A	4II Details   Hide All Details	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		
Starts Official - Document Communication to Employee     Communication Date 01-Aug-2018      Communication Date 01-Aug-2018      Communication Method 00-Aug-2018      Communicatio					

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

Rating Official Notification to Employee - Employee One						
	Gancel Transfer to Employee with E-mail Notification Transfer to Employee without E-mail Notification					
Message to Employee	<b></b> む					
	1					
Enter message here for the employee						

#### 27. Confirmation message received:

MyPerformance Main Page	Provide Guess Feedback
Confirmation	
The appraisal has been	submitted to the employee.

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