

# 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 ..... 8

        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 <https://compo.dcpds.cpms.osd.mil>.

### 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 <https://compo.dcpds.cpms.osd.mil> using your Smart Card (CAC/PIV) or non-Smart Card (non-CAC User ID) and password. From there you will be directed to *MyBiz+*. 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

The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office.

**Authorities:** 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, volumes 1100 and 1401; 29 CFR 1614.601; and E.O. 9397.

**Principal Purposes:** To allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal information.

**Routine Uses:** None. The DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system.

**Disclosure:** Voluntary. However, 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](#)

**Figure 2 - Privacy Act Statement**

### Employee Access to MyPerformance

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

Figure 3 - MyBiz+ Home Page

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

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**

MyBiz+ ICE My Biz ICE MyPerformance Logout Help Diagnostics

MyPerformance Main Page **Provide Guest Feedback** My Journal

**Appraisals as Guest Participant**

If an employee name is reflected on the table below, it means you have been invited to provide feedback as a guest participant for the employee(s) listed. Your role in the appraisal may be as a guest rater or guest reviewer. [Need Help?](#)

- **Guest Rater:**
  - DoD Performance Management Appraisal Program can provide feedback on individual performance elements and standards and provide recommended performance element and standard ratings at any stage of the performance appraisal. They cannot view others' assessments.
  - Defense Civilian Intelligence Personnel System (DCIP5) can provide feedback and ratings on individual performance objectives and performance elements at any stage of the performance appraisal. They cannot view others' assessments.
  - National Guard (Title 32) can provide feedback and ratings on individual job objectives and provide recommended job objective ratings at any stage of the performance appraisal. They cannot view others' assessments.
- **Guest Reviewer** can provide overall comments at any stage of the performance appraisal. They cannot view others' assessments.

Appraisals appear in this table until the appraisal process is complete. To display specific appraisals as either guest rater or guest reviewer, select a value in the 'Participation as' list of values.

Begin by selecting Update Feedback under the Action column.

**Plans/Appraisals for Feedback**

Participation as: All

Records Displayed: 10

Employee Name	Appraisal Date	Participation Type	Participation Status	Participation Status Date	Date Completed	Rating Official	Type	Action
No results found.								

MyPerformance Main Page Provide Guest Feedback My Journal MyBiz+ ICE My Biz ICE MyPerformance Logout Help Diagnostics

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 ICE 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 will assist you at the 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 journal information will only be accessible to you.

- 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.

(Limit to 8000 characters)

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

**MyPerformance**

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MyPerformance Main Page Provide Guest Feedback My Journal

Employee

**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 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/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.

Appraisals of One, Employee

Create New Plan

--Choose a Plan Type-- Go

Records Displayed 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	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 search for completed plans.  
[Show Completed Plans/Appraisals](#)

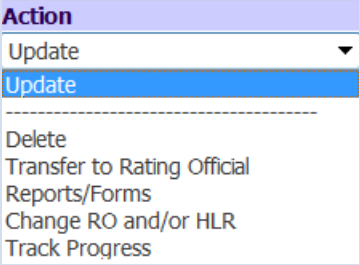
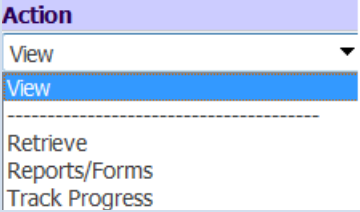
MyPerformance Main Page Provide Guest Feedback My Journal MyBiz+ ICE My Biz ICE MyPerformance Logout Help Diagnostics

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
Type	Identifies the three types of plans that may be created: <ul style="list-style-type: none"> <li>• <b>DoD</b> – DoD Performance Management Appraisal Program (DoD employees will select this option.)</li> <li>• <b>DCIPS</b> - Defense Civilian Intelligence Personnel System</li> <li>• <b>NG</b> – National Guard (Title 32)</li> </ul>
Plan Status	Indicates the status of your performance plan: <ul style="list-style-type: none"> <li>• <b>Approved</b> – Performance plan has been approved and communicated to the employee</li> <li>• <b>Modified</b> – An approved performance plan has been changed and the changes have not been approved</li> <li>• <b>Pending</b> – Performance plan has been initiated and saved but not approved</li> </ul>
Current Status	Indicates progression through the steps of the performance management process <ul style="list-style-type: none"> <li>• <b>Plan in Progress</b> – 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</li> <li>• <b>Plan Approved</b> – Performance plan has been approved (or modified performance elements and standards have been reapproved)</li> <li>• <b>Progress Review in Process</b> – Progress review has been created but not approved</li> <li>• <b>Progress Review Completed</b> – Progress review has been approved by rating official and acknowledged by employee</li> <li>• <b>Narrative Statement in Progress</b> – Narrative statement has been started but not approved</li> <li>• <b>Narrative Statement Completed</b> – Narrative statement has been completed by rating official and acknowledged by employee</li> <li>• <b>Annual Appraisal in Progress</b> – Annual Review has been created and transferred to rating official but not approved</li> </ul>

<p>Action</p>	<p>You are the current owner of the performance plan/appraisal</p>  <p>You are not the current owner of the performance plan/appraisal</p>  <p>Available actions are determined by ownership and status</p> <ul style="list-style-type: none"> <li>• <b>Update</b> – Current owner and allows you to update plan/appraisal</li> <li>• <b>Delete</b> – You can only delete a pending plan that you created and has not been transferred to the rating official</li> <li>• <b>Transfer to Rating Official</b> – Routes plan/appraisal to rating official</li> <li>• <b>Reports/Forms</b> – To print or save reports and/or forms</li> <li>• <b>Change RO and/or HLR</b> – Change current <b>R</b>ating <b>O</b>fficial or <b>H</b>igher <b>L</b>evel <b>R</b>eviewer for plan/appraisal</li> <li>• <b>Track Progress</b> – Displays status of your performance plan throughout the performance cycle</li> <li>• <b>View</b> – Only allows you to view performance plans</li> <li>• <b>Retrieve</b> – If the performance plan has not been opened by the rating official, you can retrieve it from rating official</li> </ul>
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## 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.

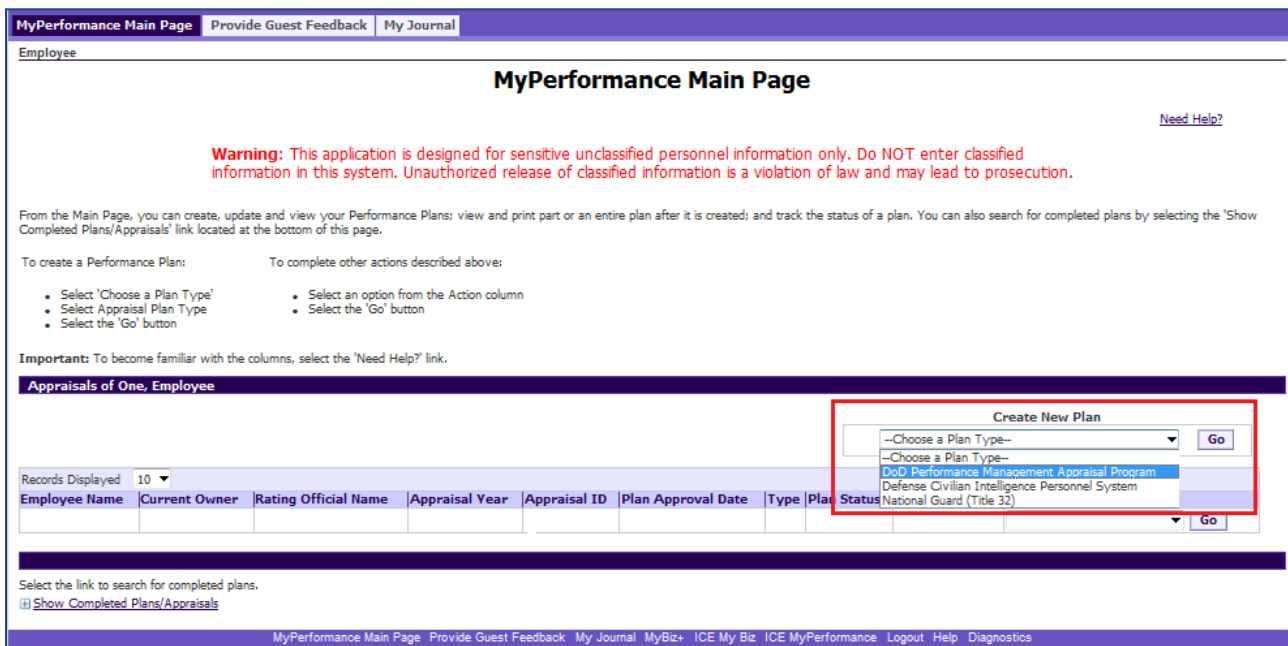


Figure 8 - MyPerformance Main Page

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.

Create Performance Plan

[Cancel and Return 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

TIP 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

MySite ICE My Site ICE MyPerformance FAQ Logout

Figure 9 - Create Performance Plan



**Table 2 – Create Performance Plan page - Setup Details fields and descriptions**

This 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.

The screenshot shows the 'Create Performance Plan' page. The 'Setup Details' section is highlighted with a red box. It contains the following fields:

- \* Appraisal Type: Annual Appraisal - DoD
- \* 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

A 'Build New Plan' button is highlighted with a red box. A tip indicates that the Appraisal Period Start Date represents the start of the performance evaluation period.

**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 [Need Help?](#) 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.

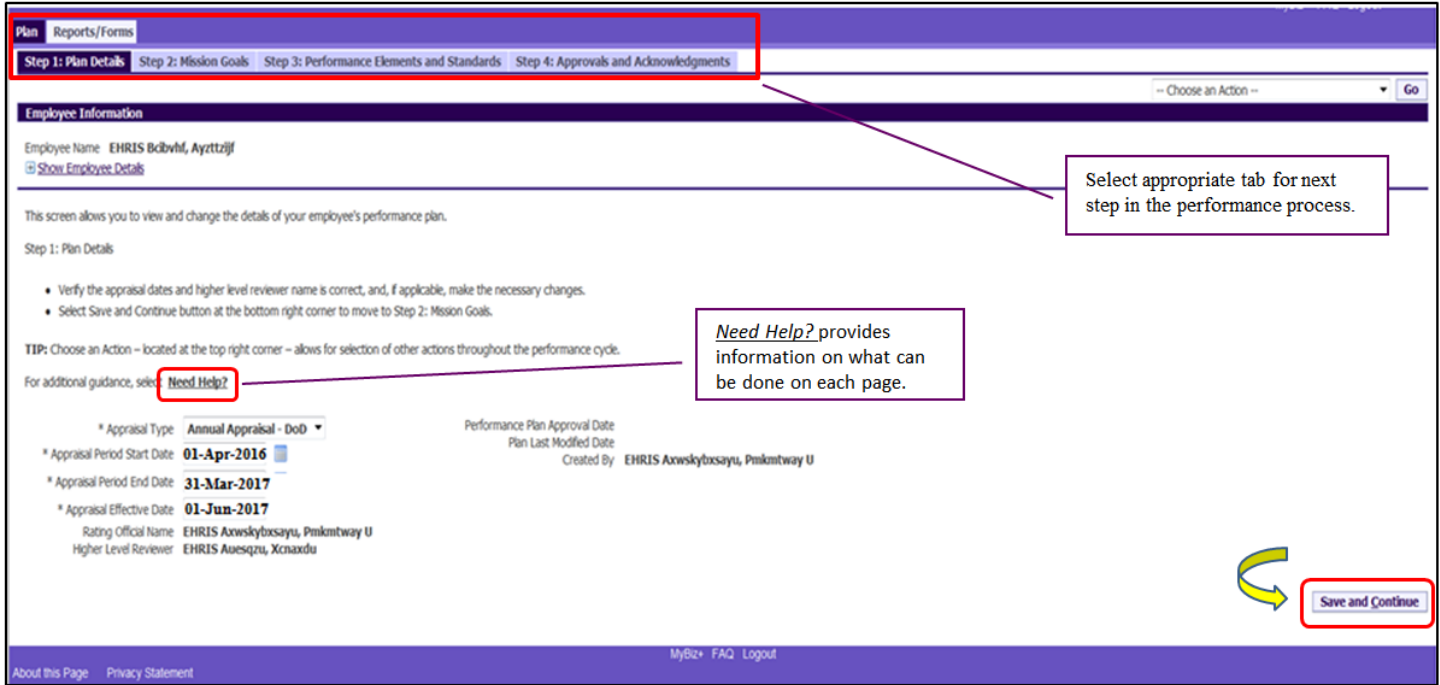


Figure 11 - Plan > Plan Details Page

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.

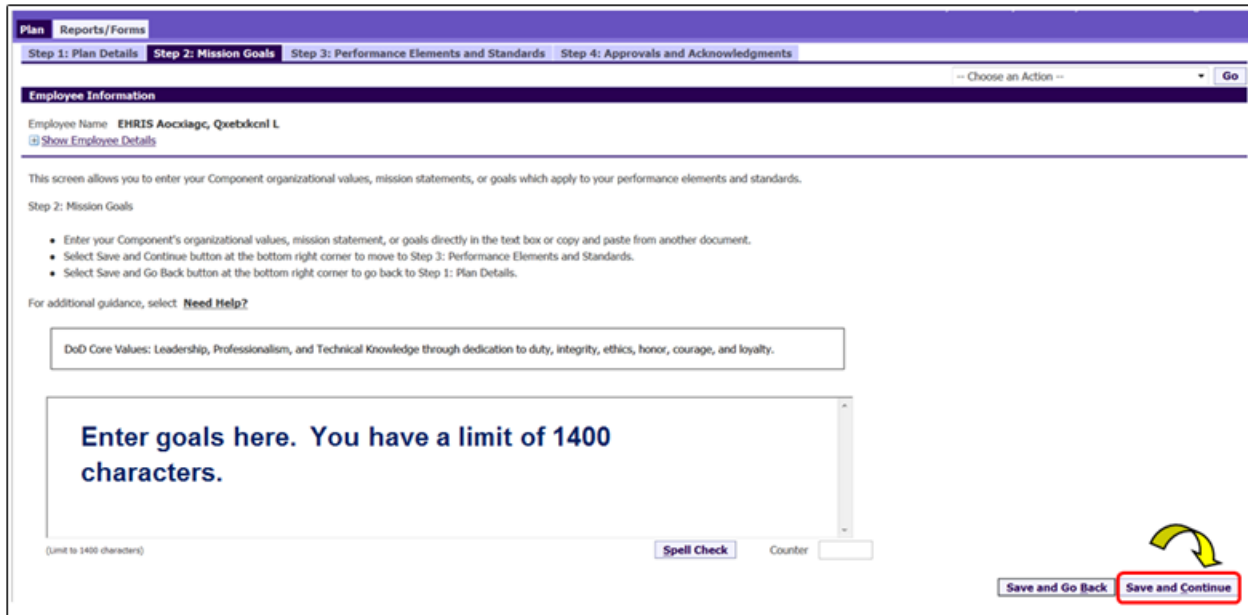


Figure 12 - Plan > Step 2: Mission Goals Page

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

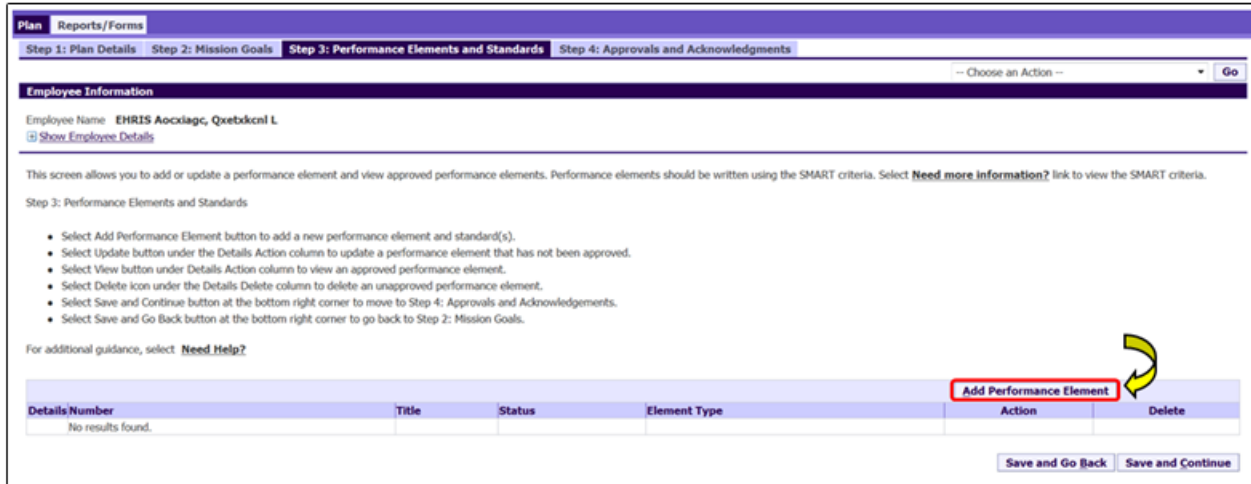


Figure 13 - Plan > Step 3: Performance Elements and Standards Page

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

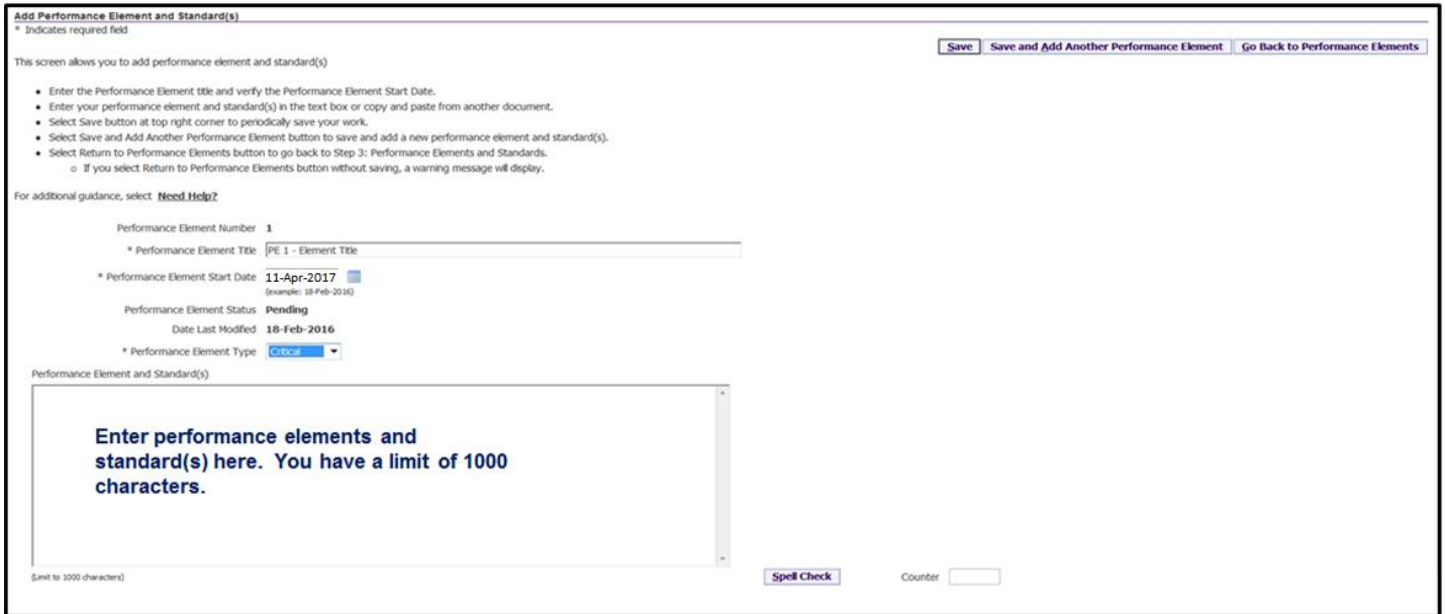


Figure 14 - Add Performance Element and Standards Page






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

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.

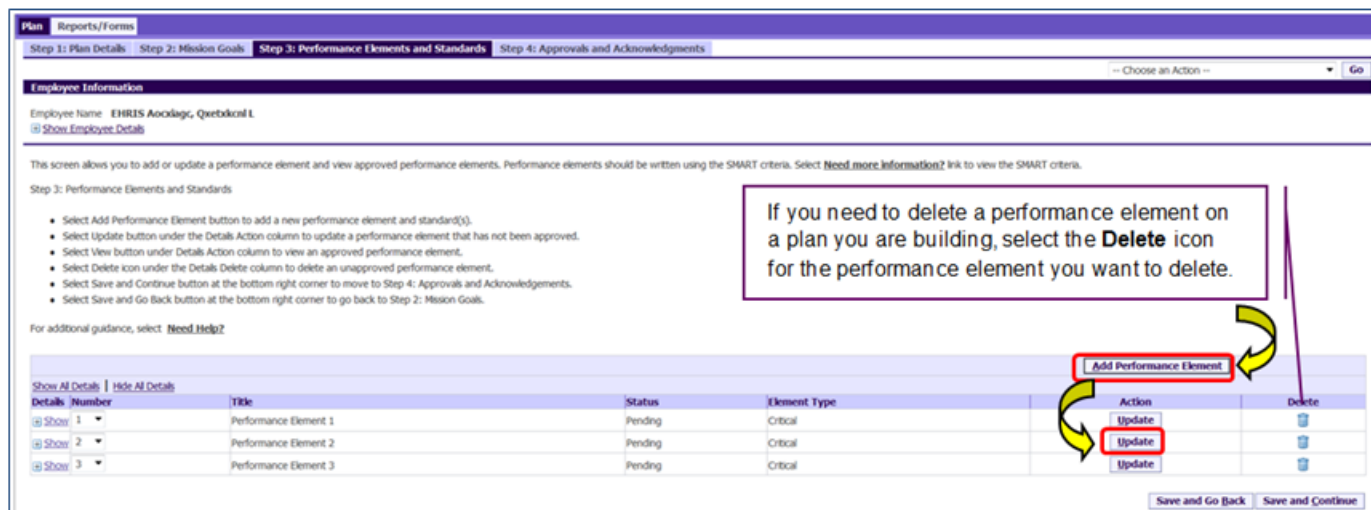


Figure 15 -Plan > Step 3: Performance Elements and Standards Page

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)



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.

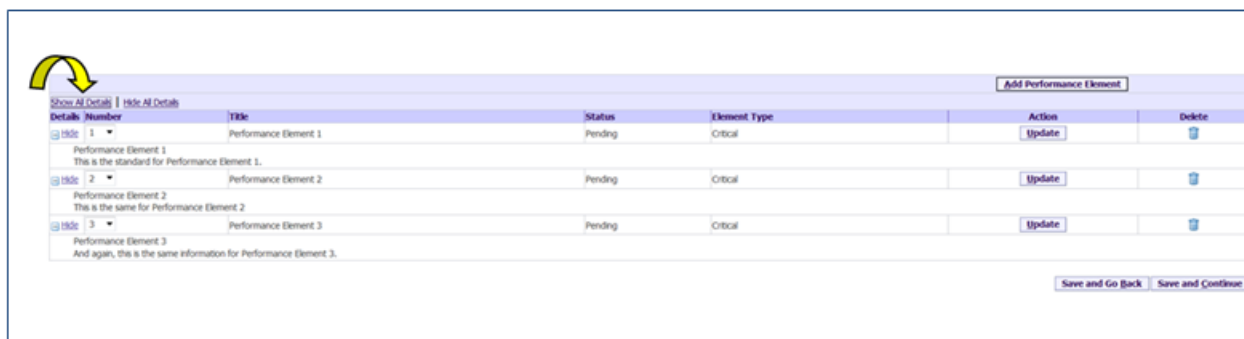


Figure 17 - Plan > Step 3: Performance Elements and Standards Page

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.

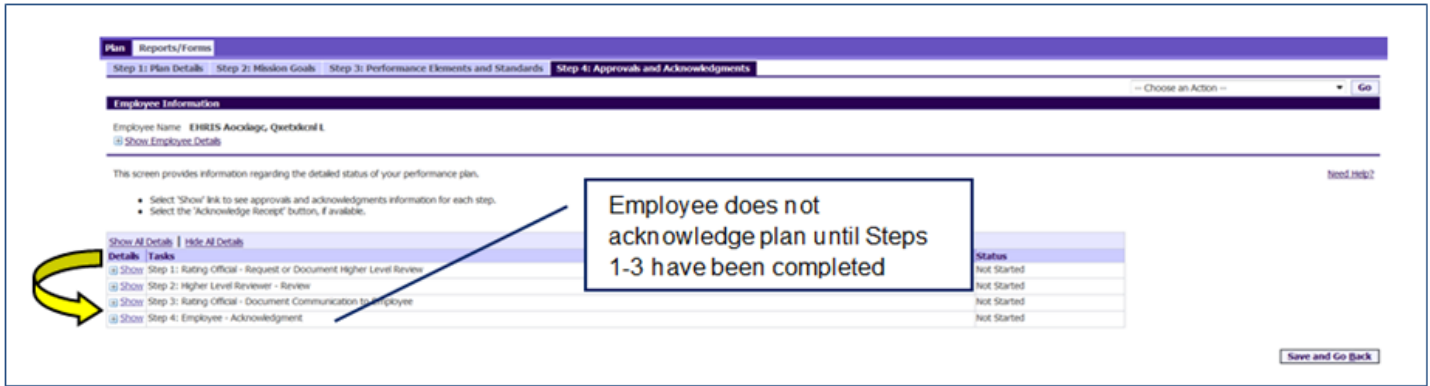


Figure 18 - Plan > Step 4: Approvals and Acknowledgements Page

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)

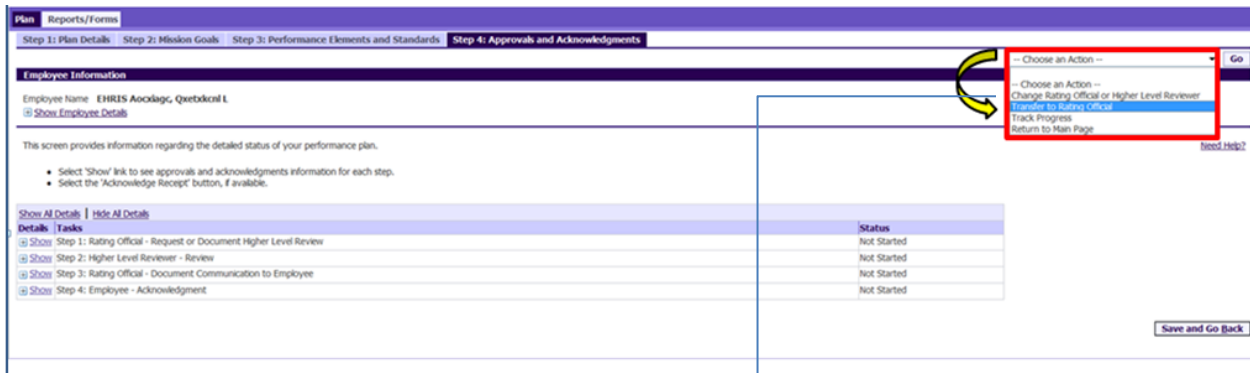


Figure 19 - Plan > Step 4: Approvals and Acknowledgements Page



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.

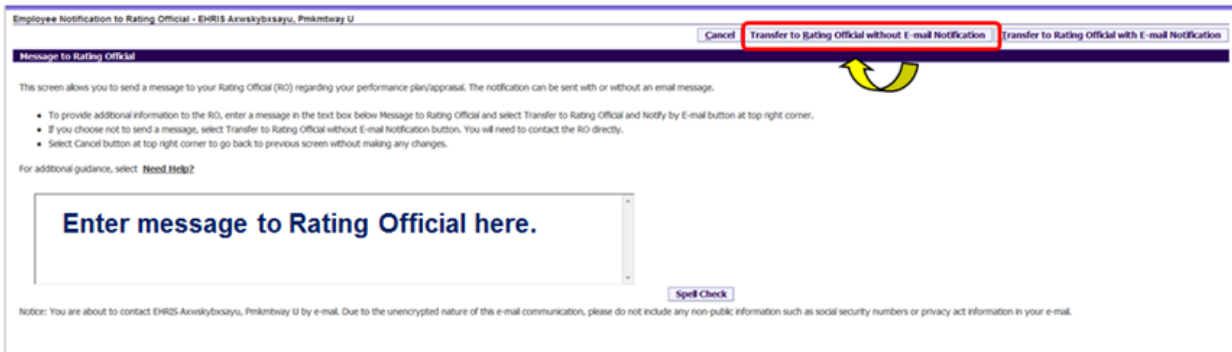


Figure 21 - Plan > Step 4: Approvals and Acknowledgements > Employee Notification to Rating Official Page

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.

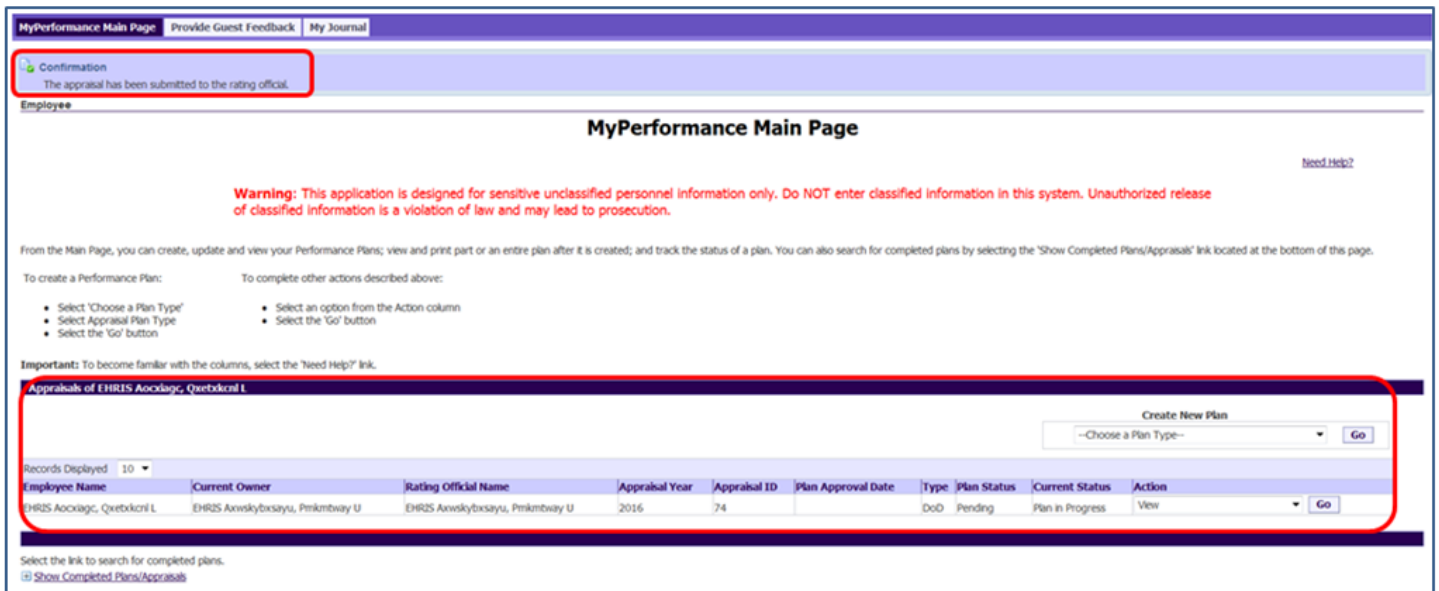


Figure 22 - MyPerformance Main Page

### 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.

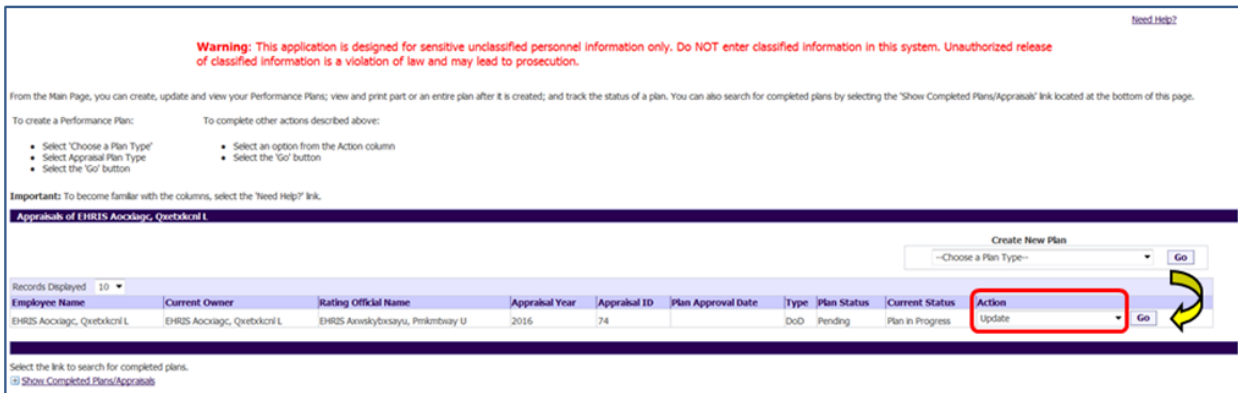


Figure 23 - MyPerformance Main Page



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.

The screenshot displays the 'Plan > Step 1: Plan Details' page. At the top, there is a navigation bar with tabs for 'Step 1: Plan Details', 'Step 2: Mission Goals', 'Step 3: Performance Elements and Standards', and 'Step 4: Approvals and Acknowledgments'. A dropdown menu labeled 'Choose an Action --' and a 'Go' button are highlighted with red boxes. Below the navigation bar is the 'Employee Information' section for 'EHRIS Aocxiagc, Qxebkcnl L'. The main content area includes instructions for Step 1, a tip about the 'Choose an Action' dropdown, and a form with the following fields:

- \* Appraisal Type: Annual Appraisal - DoD
- \* Appraisal Period Start Date: 01-Apr-2016
- \* Appraisal Period End Date: 31-Mar-2017
- \* Appraisal Effective Date: 01-Jun-2017
- Rating Official Name: EHRIS Acwskybsayu, Pmkmtway U
- Higher Level Reviewer: EHRIS Auesqzu, Xcnaxdu

Additional fields include 'Performance Plan Approval Date', 'Plan Last Modified Date', and 'Created By: EHRIS Aocxiagc, Qxebkcnl L'. A 'Save and Continue' button is highlighted with a red box at the bottom right.

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.

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.

Details	Number	Title	Status	Element Type	Action	Delete
Show: 1	*	Performance Element 1	Pending	Critical	Update	🗑️
Show: 2	*	Performance Element 2	Pending	Critical	Update	🗑️
Show: 3	*	Performance Element 3	Pending	Critical	Update	🗑️

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

Save Save

This screen allows 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

\* Performance Element Start Date **04-Apr-2017**  
(example: 18-Feb-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.

(Limit to 1000 characters)

Spell Check Counter 72

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.

Plan 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 Anodjag, Qerobokof L  
[Show Employee Details](#)

This screen allows you to add or update a performance element and view approved performance elements. Performance elements should be written using the SMART criteria. Select [Need more information?](#) link to view the SMART criteria.

Step 3: Performance Elements and Standards

- Select Add Performance Element button to add a new performance element and standard(s).
- Select Update button under the Details Action column to update a performance element that has not been approved.
- Select View button under the Details Action column to view an approved performance element.
- Select Delete icon under the Details Delete column to delete an unapproved performance element.
- Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgments.
- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

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

Show All Details | Hide All Details

Details	Number	Title	Status	Element Type	Action	Delete
<a href="#">Show</a>	1	Performance Element 1	Pending	Critical	<a href="#">Add Performance Element</a> <a href="#">Update</a> <a href="#">Update</a>	
<a href="#">Show</a>	2	Performance Element 2	Pending	Critical	<a href="#">Update</a> <a href="#">Update</a>	
<a href="#">Show</a>	3	Performance Element 3	Pending	Critical	<a href="#">Update</a> <a href="#">Update</a>	

Save and Go Back Save and Continue

**If you need to delete a performance element on a plan you are building, select the **Delete** icon for the performance element you want to delete.**

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

This screen allows you to update a performance element and standard(s).

- Verify the Performance Element Title and start date; update the performance element and standard(s) in the text box below, 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 the performance element you worked on and another page will display to add another performance element.
- 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 **2**

\* Performance Element Title

\* Performance Element Start Date **05-Apr-2016**  
(example: 19-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 performance element identified in the title area. This information is added to show the updating of a performance element in this screen.







(Limit to 1000 characters)

Counter

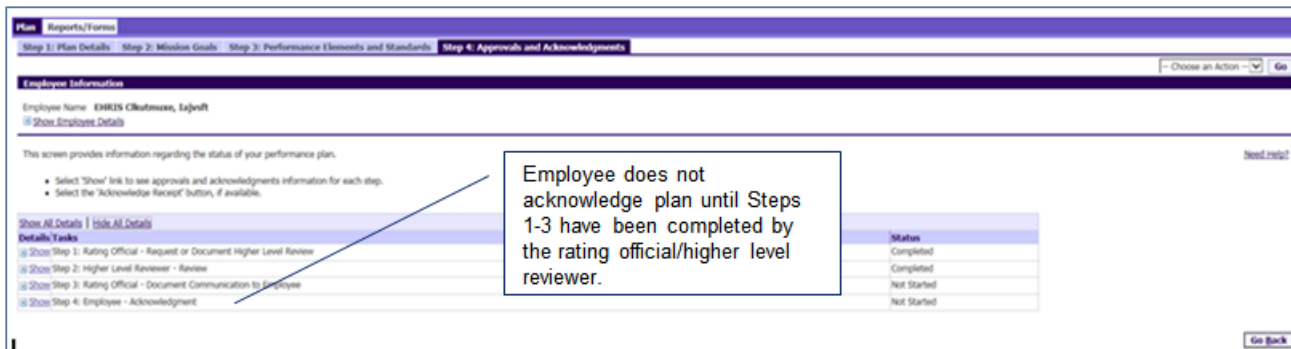
**Figure 29 - Update Performance Element and Standard(s) Page**

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

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.



**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.

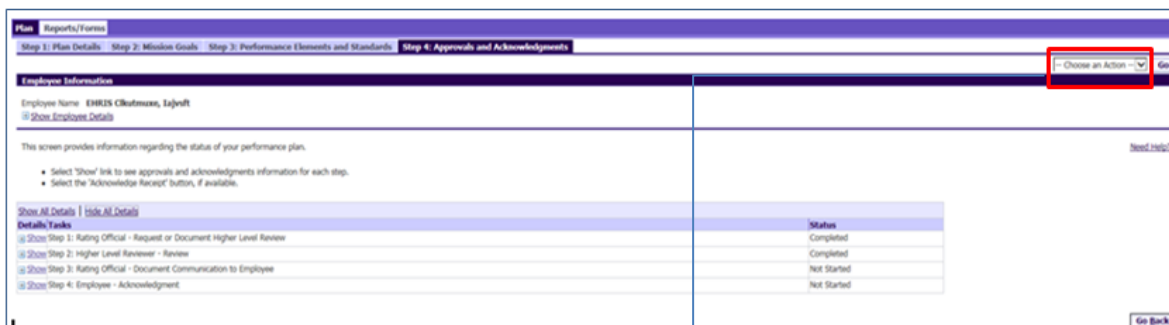


Figure 31 - Plan > Step 4: Approvals and Acknowledgements Page



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.

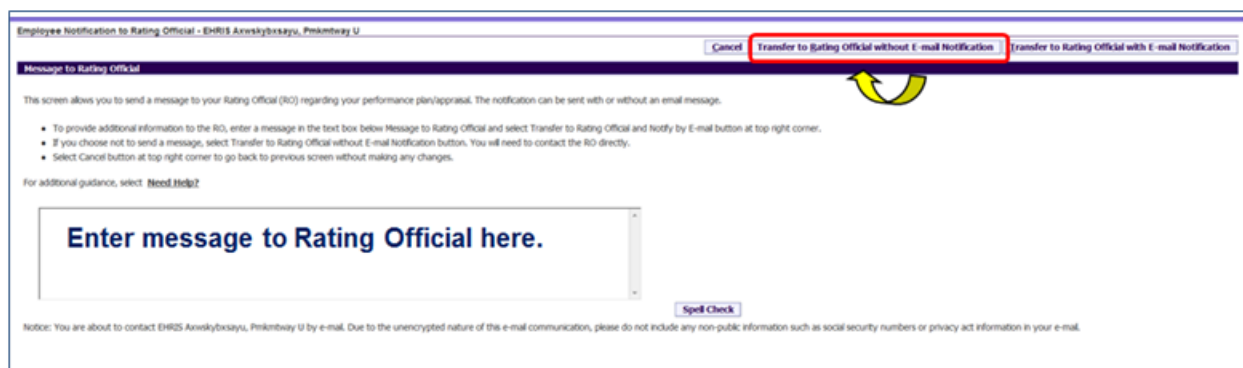


Figure 33 - Plan > Approvals and Acknowledgements > Employee Notification to Rating Official Page

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.

The screenshot shows the MyPerformance Main Page interface. At the top, there are navigation tabs: "MyPerformance Main Page", "Provide Guest Feedback", and "My Journal". A confirmation message is displayed in a red-bordered box: "Confirmation: The appraisal has been submitted to the rating official." Below this, the page title "MyPerformance Main Page" is centered. 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." Instructions for creating and managing performance plans are provided. A table titled "Appraisals of EHR25 Asockay, Qurtobal I" is shown, with a "Create New Plan" button above it. 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. A "Show Completed Plans/Appraisals" link is at the bottom.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHR25 Asockay, Qurtobal I	EHR25 Asockay, Qurtobal I	EHR25 Asockay, Qurtobal I	2016	74		DoD	Pending	Plan in Progress	View

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)



Figure 35 - Step 4 Approvals and Acknowledgement Tab

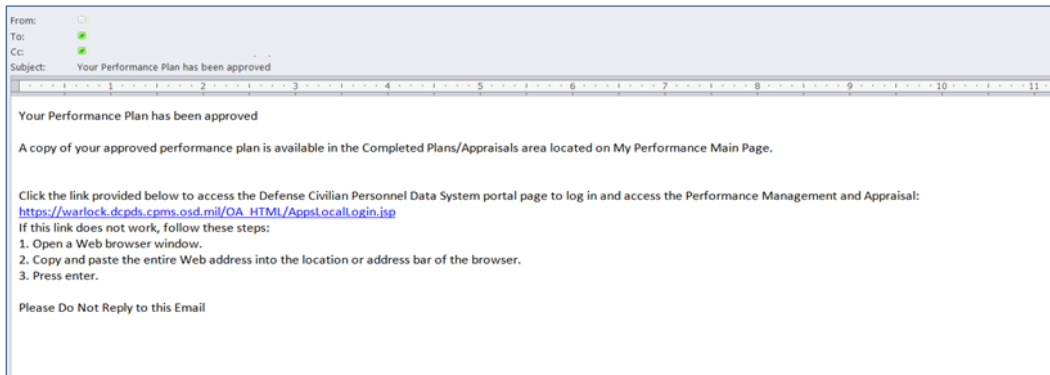


Figure 36 - Email to Employee – Plan Approved

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.

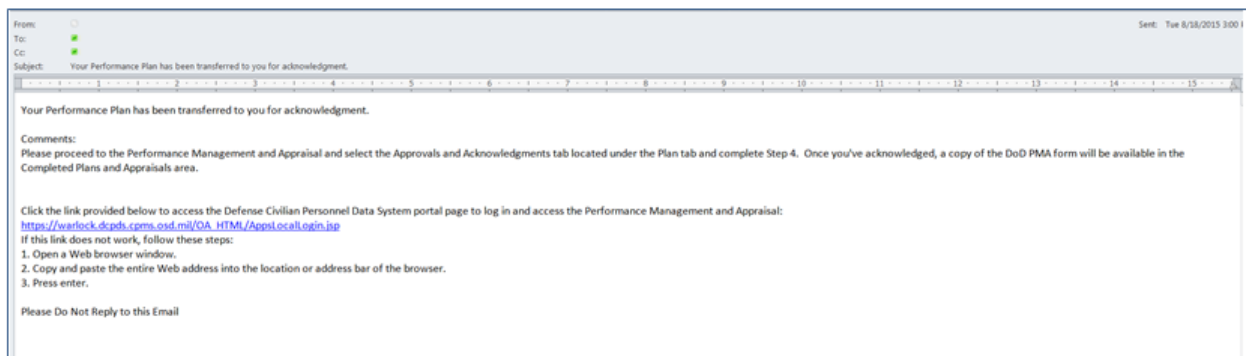


Figure 37 - Email to Employee - Next Steps



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

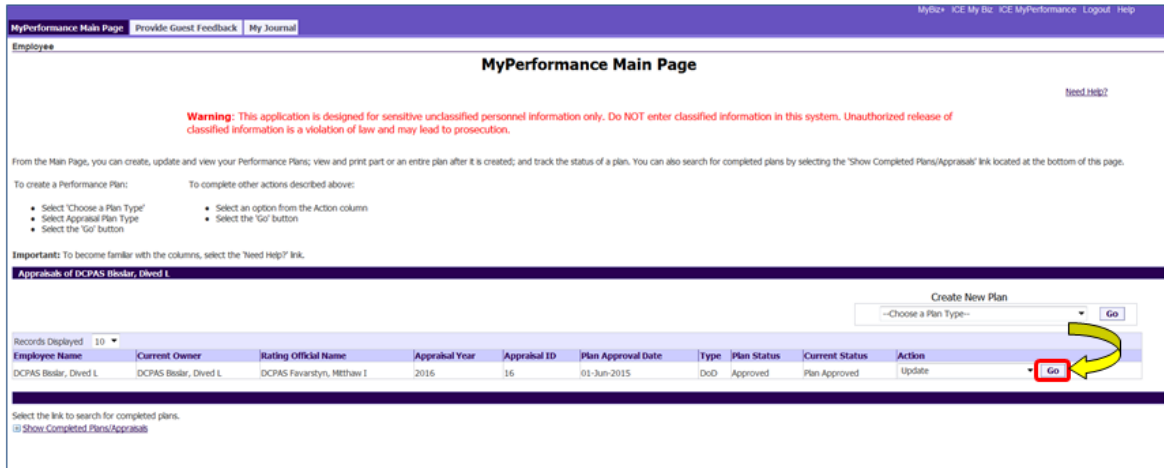


Figure 38 - MyPerformance Main Page - Pending Acknowledgement

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.

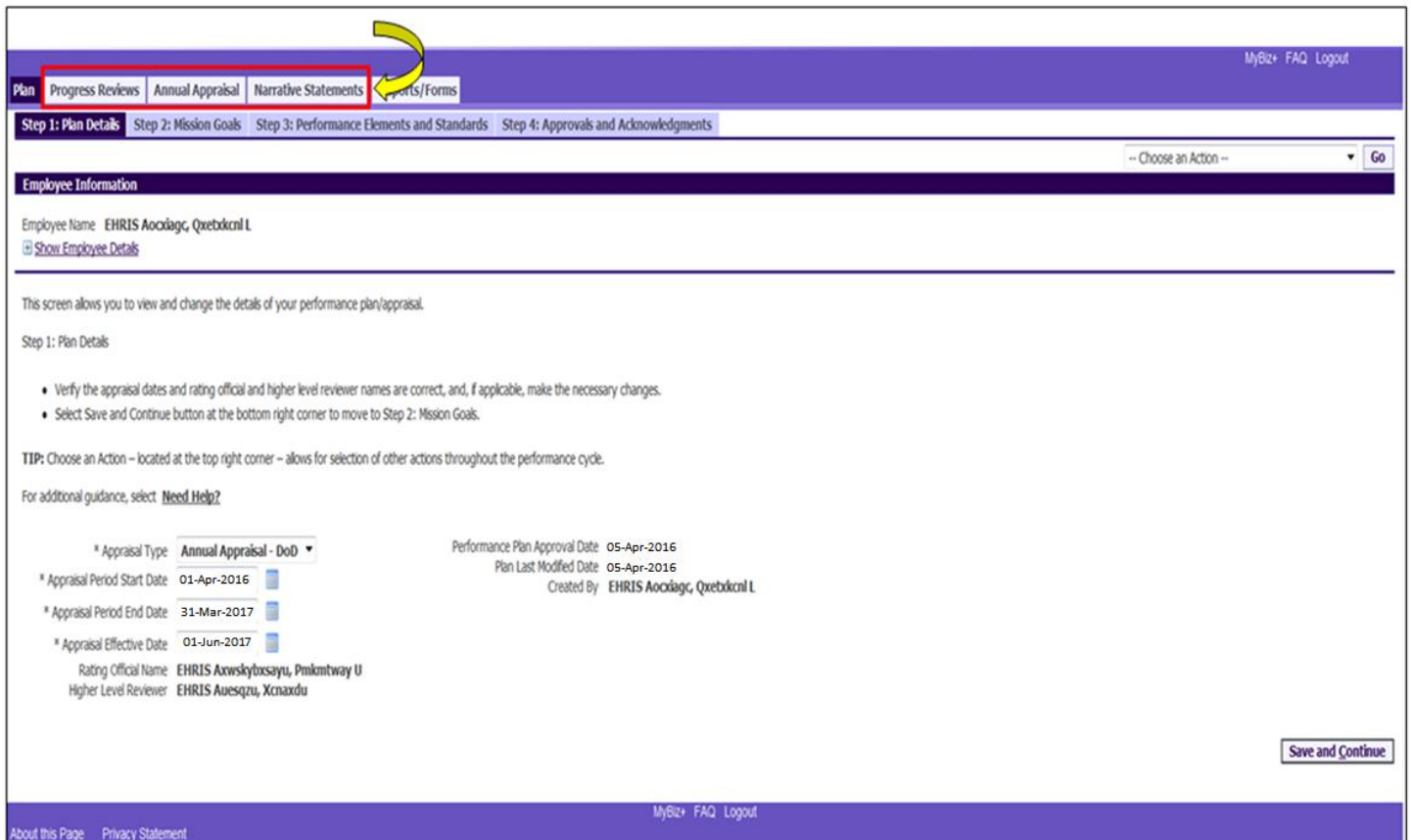


Figure 39 - Plan tab - Identifying Additional Tab Availability

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

The screenshot shows the 'DoD Performance Management Appraisal Program' interface. The navigation bar includes 'Plan', 'Progress Reviews', 'Annual Appraisal', 'Narrative Statements', and 'Reports/Forms'. The current step is 'Step 4: Approvals and Acknowledgments'. Below the navigation, there is an 'Employee Information' section for 'EHRIS Aoc0agc, Qxebkcnl L'. A table displays the status of various tasks:

Details	Status	Action
Step 1: Rating Official - Request or Document Higher Level Review	Completed	Step 1 completed
Step 2: Higher Level Reviewer - Review	Completed	Step 2 completed
Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed
Step 4: Employee - Acknowledgment	Pending Empl Acknowledgment	<b>Acknowledge Receipt</b>

The 'Acknowledge Receipt' button in the 'Action' column for Step 4 is highlighted with a red box and a yellow arrow. Other interface elements include 'Show All Details', 'Hide All Details', 'Save and Go Back', and 'Need Help?'.

Figure 40 - Plan>Step 4 Approvals and Acknowledgments 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.

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.

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 One, Employee**

Create New Plan

Records Displayed: 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
One, Employee	Rater, The	Rater, The	2017	53	29-Apr-2016	DoD	Approved	Plan Approved	View <input type="button" value="Go"/>

Select the link to search for completed plans.  
 Hide Completed Plans/Appraisals

**Completed Plans/Appraisals**

1. Begin with entering search criteria. The following fields can be entered in any combination: a) Appraisal Year only or b) Appraisal Year and Event.  
 2. Select the Find button. Your results will be based on your search criteria. If there is no search criteria entered, your results will be all Completed Plans/Appraisals.

Appraisal Year:   
 Event:

Records Displayed: 10

Appraisal Year	Appraisal ID	Type	Event	Event Completion Date	Reports/Forms
No search conducted.					

[MyPerformance Main Page](#) | [Provide Guest Feedback](#) | [My Journal](#) | [MyBiz+](#) | [ICE My Biz](#) | [ICE MyPerformance](#) | [Logout](#) | [Help](#) | [Diagnostics](#)

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