## HAWAII NATIONAL GUARD PERFORMANCE MANAGEMENT HANDOUT



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### **References:**

DoDI 1400.25 Vol 431 (DoD Civilian Personnel Management System: Performance Management and Appraisal), 04 February 2016, incorporating change 2, 1 July 2020.

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CNGBI 1400.25 Vol 431 (National Guard Technician and Civilian Personnel Performance Management and Appraisal Program), 20 January 2022.

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### Applicability:

*Title 5 and Title 32 National Guard Employees, Rating Officials (ROs) and Higher Level Reviewers (HLRs)* 

### **Purpose:**

To provide step by step guidance on how to properly build performance plans, complete progress reviews and annual appraisals for the DoD Performance Management and Appraisal Program.

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### **PERFORMANCE PLAN- THE BASICS**

### Staff Responsibilities:

<u>Rating Officials (RO) (*Supervisors*)</u>: The supervisor is responsible for drafting the performance plan every year beginning 1 April. Previous performance plans, the Position Description (PD), and the employee's input are the three main sources used to draft the performance plan.

<u>Higher Level Reviewer (HLR) (*At least one Level Higher than the Supervisor*): The Higher-Level reviewer should review and approve the performance plan.</u>

NOTE: Same RO/HLR? For employees whose immediate supervisor is TAG, TAG serves as both RO and HLR. No other exceptions are authorized.

<u>Employee</u>: Work with the supervisor to provide input into the performance plan. Acknowledge the performance plan once it has been approved and returned to the employee for acknowledgement.

#### Plan Elements:

<u>Critical Elements</u>: Each employee shall have their primary responsibilities or work functions described in their performance plan as a critical element.

- Performance plans shall consist of at least two critical elements, but no more than ten.
- Critical elements may be changed, added or deleted within the current appraisal period, as long as there are at least 90 calendar days prior to the end of the appraisal period.
- Individuals who have an approved telework agreement must have telework standards addressed in their performance plan (see page 6).
- A supervisor's performance plan must have a mandatory supervisory critical element(s) that addresses the following:
  - Equal Employment Opportunity
  - o Prohibited Personnel Practices
  - Performance Management Actions, and
  - Whistleblower Protection Statement

- Final Decisions regarding performance plans are within the sole and exclusive discretion of management.

Smart Criteria: Performance elements should consist of SMART criteria as follows:

- **Specific.** Describe expected accomplishments
- **Measurable.** Performance element is clear and is quantified or substantiated using objective criteria.
- Achievable. Goals are realistic, challenging and accomplishable.
- **Relevant.** Element aligns with organizational mission and success.
- **Timely.** Goals have realistic timeframes.

#### Supervisor Critical Element (Rating Official)

The Supervisor Critical Element must include statements that address their role as a supervisor, as well as specific statements regarding EEO and Whistleblower Protection. Below are some examples.

- Supervises personnel assigned to (Office Name). Advises and provides counsel to employees regarding policies, procedures, and directives of management. Selects or recommends selection of candidates for vacancies, promotions, details and reassignments in consideration of skills and qualifications, mission requirements, and EEO and diversity objectives.
- Explains performance expectations to employees and provides regular feedback on strengths and weaknesses. Holds employees responsible for satisfactory completion of work assignments. Initiates action to correct performance or conduct problems; prepares documentation to support action taken. Identifies employee developmental needs and provides or arranges for training, formal and informal.
- Hears and resolves employee complaints and refers serious unresolved complaints to higher level management. Periodically reviews position descriptions to ensure accuracy, and the most effective utilization of personnel resources.
- Supports the Whistleblower Protection Program by responding constructively to employees who make protected disclosures under 5 USC 2302(b)(8); taking responsible and appropriate actions to resolve any such disclosures; and creating an environment in which employees feel comfortable making such disclosures.

If the supervisor also serves as a Higher Level Reviewer (HLR), consider language like the following:

- Ensures equitable application of performance management goals throughout the organization. Explains performance expectations of organization to

supervisors and provides regular feedback on strengths and weaknesses to supervisors annually. Holds supervisors responsible for satisfactory completion of performance management duties, plan, mid-term review, and appraisals. Encourages action to commend and/or correct performance or conduct by the use of awards, PIPs, non-disciplinary actions, and adverse actions.

<u>Telework</u>: Employee's on an approved regular telework agreement must have telework duties addressed within their performance plan. If all duties can be performed on telework, each element should state "All duties remain the same on telework". If only certain duties can be performed while on telework it should be noted accordingly within the plan element.

#### Timeline:

- Normal annual appraisal period is 01-April to 31-March, which is due 31 May with an effective date of 01-June.
- Performance Plans should be communicated and documented within **30 calendar days** from the start of the rating cycle (NLT 30 April for a standard annual appraisal), entrance on duty as a new employee, or job change.
- Performance Plans **must be approved for 90 days prior to receiving a rated appraisal**. Employees who do not have 90 days under an approved plan will be unable to receive an appraisal and will be ineligible for any appraisal-based awards for that year. Leave without pay may not be applied toward the 90-day minimum.

# STEP BY STEP: BUILDING THE INITIAL PERFORMANCE PLAN

DCPDS Portal – Login https://compo.dcpds.cpms.osd.mil/

**STEP 1**: Login to your MyBiz+ Homepage. Find "Manager Functions" under KEY SERVICES. Click on "Performance Management and Appraisal"

Note: Your homepage may look different due to varying permissions within MyBiz+.

Welcome,	The informa	ation is current as of 17-Jun-	20:
Home			
## Key Services		<b>##</b> Other DCF	PD
Ma	inage Key Services 🦞	DCPDS Naviga	ato
MyPerformance		Add HR Region	۱A Pr
Request Employment Verification			
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Update MySupervisor			
Civilian Career Brief			
Manager Functions			
Performance Management and Appraisal			
Apply Action(s) to Multiple Employees			
Manage MyPerformance Trusted Agent Au	thorization		
View/Print Performance Management Repo	orts		
View Previous Requests			

**STEP 2**: Find "Create New Plan" drop down menu. Click the arrow and select the option "DOD Performance Management Appraisal System". Hit "GO".

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From the Main Page, you can create, update and v	view employee Performance Plans; cha	nge the Rating Official and/	or Higher Level Review	wer; view and print part or an en	tire plan after i	it is created; close a	plan, and track the stat	tus of a plan.				
You can also search for completed plans by selecti	ing the 'Show Completed Plans/Apprais	als' link located at the botto	m of this page.									
To create a Performance Plan: To	complete other actions described abo	ve:										
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> </ul>	Select an option from the Action of	olumn										
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**STEP 3**: Find the employee you are creating the plan for and select the corresponding "Create" on the righthand side of the page. *If the employee is not listed, contact HRO for further information.* 

People in Hierarchy	у			
The MuDefermence lead is an		and hulle and D-D Management Dation and sign and in D-DI 4400 25 Marsing 420, dated August 5, 2045, and where any		Return to Main Page
The MyPenormance tool is on	ny available to employees and supervisors whose position is cov	ered by the new DoD management Policy contained in DoD1 1400.25 version 430, dated August 5, 2015, and whose org	mization is scheduled for immediate transition to the new pend	Need Help
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**STEP 5**: Set Appraisal Start, End, and Effective Dates. Fill in RO name and HLR name. When selecting the RO and HLR, type the last name and the search button to ensure you select the correct account for each role. *See page 4. Timeline for further information on dates. See page 3. Staff Responsibilites for further information on RO and HLR.* 

reate Performance Plan						
mployee Information						
Employee Name Show Employee Details						
etup Details						
* Indicates required field						
Appraisal Type	Annual Appraisal	- DoD od under t	his plan. Plea	se review and	chap	e, if necessar
Appraisal Type IP The Appraisal Period Start Date represents the start of the employee's performa Appraisal Period Start Date	Annual Appraisal nce evaluation perio 01-Apr-2022	- DoD od under t	his plan. Plea	se review and	chap	e, if necessar
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NOTE: If you plan to base the new plan on an existing plan (like the prior year's plan), at this step go to the description on Page 13 for step-by-step instructions on copying an existing plan.

#### STEP 6: Select "Build New Plan"

Create Performance Plan		
		Cancel and <u>R</u> eturn to Main Page
Employee Information		Need Help
Employee Name		
Show Employee Details		
Setup Details		2
* Indicates required field		
		Build New Plan Copy from Existing Plan
Appraisal Type A	al Appraisal - DoD	
GTIP The Appraisal Period Start Date represents the start of the employee's performance	uation period under this plan. Please review and change this date, if necessary.	
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(4	nm-yyyy)	
Appraisal Effective Date 0	n-2023 🕅	
(6	nm-yyyy)	
* Rating Official Name	3 Q	
* Higher Level Reviewer Name	N Q	

**STEP 7**: Select "Step 2: "Mission Goals" Tab and insert your mission goals in the empty box. When done select "Save and Continue at the bottom. *Note: Mission Goals are overall comments on how the position supports the organization, which are supported by the Performance Elements in the next section.* 

Plan View/Print Form		
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments		
Employee Information		Choose an Action V Go
Employee Name  Show Employee Details		
DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integri	ity, ethics, honor, courage, and loyalty.	
This screen allows you to enter your employee's Component organizational values, mission statements, or goals which apply to their perform	mance elements and standards.	
Step 2 Mission Goals Enter your Component's organizational values, mission statement, or goals directly in the text box or copy and paste from another do Select Save and Continue button at the bottom right corner to move to Step 3. Performance Elements and Standards. Select Save and Goals button at the bottom right corner to go back to Step 1. Plan Details.	ocument.	
For additional guidance, select Need Help?		
Suggestion: User verbiage from Position		
Description under title: Position Duties		
(Limit to 1000 characters)	<u>Spell Check</u> Counter	
		Save and Go Back Save and Continue

**STEP 8**: Step 3: Performance Elements and Standards, Select "Add Performance Element"



**STEP 8**: Insert Title of the Element under "Performance Element Title" and insert SMART standard in the box "Performance Element and Standard(s)

Performance Element Number	1	
* Performance Element Title		
* Performance Element Start Date	01-Apr-2023	
Performance Element Status	Pending	
Date Last Modified	21-Jun-2022	
* Performance Element Type	Critical 🗸	
Performance Element and Standard(s)		
(Limit to 1500 charaters)		Spell Check Counter

**STEP 9**: Click "Click Save and Add Another Performance Element". (Repeat step 9. until all performance elements are added.)

Add Performance Element and S	itandard(s)			
* Indicates required field				
This screen allows you to add performance element	and standard(s)	<u>S</u> ave	Save and Add Another Performance Element	Go Back to Performance Elements
Enter the Performance Element title and veri Enter your performance element and standa Select Save button at to pright corner to peri Select Save and Add Another Performance E Select Return to Performance Elements but o If you select Return to Performance E	ly the Performance Element Start Data (dbi) in the fact too copy and pates into another document, obtain two your vork. Iement button to save and add a new performance element and standard(s). Ion to go back to Skep 3. Performance Elements and Standards. Elements button without saveya, a variant greasage will display.			
For additional guidance, select Need Help?				
Performance Element Number	1			
* Performance Element Title				
* Performance Element Start Date	01-Apr-2023 ñb (ds-mm-yyy)			
Performance Element Status	Pending			
Date Last Modified	21-Jun-2022			
* Performance Element Type	Critical 🗸			
Performance Element and Standard(s)				

**STEP 10**: Step 4: Approvals and Acknowledgements, Find Step 1: Rating Official – Request or Document Higher Level Review (if required) and select "Start" under Action.

V	/iew/Print Form				
itep 1	1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowle	edgments			
_					Choose an Acti
Emp	ployee Information				
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For	s creen allows you to start the approval process or view approval information and status of the employee's performance plan. Inp 4. Approvals and Acknowledgments Select Show Nink to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link Select Show Nink to see approvals and acknowledgment information for each step and Hide link to collapse step. Select Start Vulton under Action column for the step that needs to be completed. Select Start vulton under Action column for the step that needs to be completed. Select Start vulton under Action column for the step that needs to be completed. Select Start vulton under Action column for the step that needs to be completed. Select Start vulton under Action Column for the step that needs to be completed. Select Start vulton under Action Column for the step that needs to be completed. Select Start Need Help?	t o collapse all steps.			
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**STEP 11**: Select "Transfer to Higher Level Reviewer with E-mail Notification

Name	Title	
	Rating Official	
	nigilei Level Kenewei	
essage to Higher Level Reviewer		
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This screen provides space for you to send a mail Notification' button to send the message.	Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the messag	e, select the 'Transfer to Higher Level Reviewer with E-
This screen provides space for you to send a mail Notification' button to send the message. Please review this performance plan and tak tab.	Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the message the appropriate action under the Approvals and Acknowledgments	e, select the 'Transfer to Higher Level Reviewer with E-
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**STEP 12**: HLR will review and transfer the approved plan back to the RO. Note: HLR can also suggest changes when necessary.

**STEP 13**: Step 4: Approvals and Acknowledgements, Find Step 3: Rating Official – Document Communication to Employee and select "Start" under Action.

Step 1: F	Plan Details Step 2: Mission Go	als Step 3: Performa	nce Elements and Standard	S Step 4: Approvals and Ack	nowledgments			
								Choose an Act
Emple	oyee Information							
Emple	oyee Name							
)⊧ S	Show Employee Details							
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**STEP 14**: After meeting with the employee or reviewing the plan in some other format, fill in Communication Date and Communication Method. Then select "Save and transfer to Employee for acknowledgement.

Step 1: P	an Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledg	nents		
Emplo	yee Information			Choose an
Emplo	vee Name weeks and the second se			
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•	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	
	Communication Date (dd-mmm-yyyy) Communication Method V Other Can	el Save and Transfer to Employee for A	xcknowledgment Save and go to	o Step 4
►	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed	

**STEP 15**: Employee must acknowledge the plan for it to be completed.

## STEP BY STEP: HOW TO DUPLICATE THE PREVIOUS PLAN

**STEP 1**: Follow Steps 1-5 above.

#### STEP 2: Select "Copy from Existing Plan"

Create Performance Plan		
Employee Information		Cancel and <u>R</u> eturn to
Employee Name  Show Employee Details		
* Indicates required field		
Appraisal Type	Build New Yie  Annual Appreisal - DoD evaluation period under this plan. Please review and channe this date if necessary	
* Appraisal Period Start Date	01-Apr-2022 [b] 66-mm-yyy)	
* Appraisal Period End Date	31-Mar-2023 👘	
Appraisal Effective Date	01-Jun-2023 (b) 64-mm-yyy)	
* Rating Official Name * Higher Level Reviewer Name	्र <b>Q</b> ्र <b>Q</b>	

**STEP 3**: Type in the Appraisal Effective Date you wish to duplicate. Select Find. Then select "Copy" next the plan once it populates.

Copy Performan	nce Plan							
							Return	to Plan Setup
								Need Help?
STIP Rating Officials and	d employees can copy a performance pla	n from one year to the next. Rating	can copy a plan from one employee to another	Once copied, the performance plan can be	altered accordingly.			
Search								
Note that the search is ca	se insensitive Please enter your sear Select the "magnifying appraisal effective data Employee Name	ch orteria en	uit. 2. You must enter a search criteria value in either employ	ee name or				
		**						
Appra	aisal Effective Date 01-Jun-2022	tie -						
Appra	aisal Effective Date 01-Jun-2022 (dd-mmm-yyyy) Find Clear	G⊚						
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Appra	aisal Effective Date 01-Jun-2022 (sd-mmm-yyy) Find Clear Employee Name 스	Employee Number 스	Appraisal Effective Date	Plan Approval Date	Appraisal Type	Plan Status	View	Сору

### STEP 4: Select "Yes"

Typhusu Tropun	
() Information	<u>No</u> Yes
Do you wish to conv the plan a ino the Annzaisal ID- 2742459	

**STEP 5**: Review prepopulated "Step 1: Plan Details", "Step 2: Mission Goals", "Step 3: Performance Elements and Standards" as detailed above in steps 7 - 9. Make any changes as necessary.

**STEP 6**: Complete Steps 10-15 above.

### **PROGRESS REVIEW- THE BASICS**

### Staff Responsibilities:

<u>Rating Officials (RO) (*Supervisors*)</u>: The supervisor is responsible for completing at minimum one progress review midway through the appraisal cycle. Multiple progress reviews can be completed as necessary based on need for performance feedback.

NOTE: RO should request employee to provide a self-assessment. If employee does not provide self-assessment within a reasonable timeframe the supervisor should retrieve the plan and provide the progress review, and note the employee declined to provide employee feedback.

<u>Higher Level Reviewer (HLR) (*At least one Level Higher than the Supervisor*): The Higher-Level Reviewer has the option to review and approve the progress review. This is not required.</u>

<u>Employee</u>: The employee should provide a self-assessment midway through the rating cycle and transfer to the RO. Upon receipt of progress review employee is to acknowledge the progress review.

### **Timeline:**

There must be at least one progress review during the appraisal period. The progress review should be completed approximately half-way through the rating period.

### STEP BY STEP: HOW TO COMPLETE A PROGRESS REVIEW- Employee

DCPDS Portal – Login https://compo.dcpds.cpms.osd.mil/

**STEP 1**: Login to your MyBiz+ Homepage. Click "My Performance" under KEY SERVICES.

Note: Your homepage may look different due to varying permissions within MyBiz+.

Velcome,	The information is current as of 17-Jun-20
Home	
<b>II</b> Key Services	Steel DCPD
	DCPDS Navigato
MyPerformance	Add HR Region A
Request Employment Verification	
Update Contact Information	🐔 Last Person
Civilian Career Report	Type of Action:
Update Professional Development	Effective Date:
SF50 Personnel Actions	
Update MySupervisor	
Civilian Career Brief	
Manager Functions	
Performance Management and Appraisal	
Apply Action(s) to Multiple Employees	
Manage MyPerformance Trusted Agent Authoriza	tion
View/Print Performance Management Reports	
View Previous Requests	

**STEP 2**: Find "Action" category and select "Update" from the drop-down menu. Hit "GO".





#### STEP 3: Select "Progress Reviews" tab.

#### STEP 4: Click the "Create Progress Review" button

Plan	Progress Reviews	Annual Appraisal Narr	ative Statements View/Pri	int Form					
								Choose an Action	
Emp	oloyee Informat	ion							
Emple	oyee Name PRIHO	DA, TAMMY M							
) S	how Employee Detail	s							
This	croop allows you to a	reate undate er view com	plated programs reviews. Br	arross Reviews are performance discussions that p	nust he decur	ageted in the McDerformance teel. Emple	upper must have at least one desumented pro-	more review which two	two through the
cycle.	creen allows you to c	reate, update of view con	pieted progress reviews. Pro	spress Reviews are performance discussions that h	nust be docun	rented in the wyrienonnance tool. Emplo	yees must have at least one documented prog	press review which typ us his	away unough ure j
	Select Create Progr	ess Review button to crea	te a progress review.						
:	Select Update butto Select View History	n under Action column to button under Action colun	update a progress review. In to view a completed prog	ress review.				JL	
For a	· les encebiun lenoitht	ect Need Hein?							
	·····								
								Create Progress Review	i i 🐹 😂 🕞 i
	Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action D
	No results found.								

**STEP 5**: Provide Self-assessment under "Employee Input" and click "Go to Next Performance Element". Complete "Employee Input" on each Performance Element.

Assessments	Approval	is and Acknowledgments			
This s	creen allows	s you to view your performance elements and standards and provide input.			
For as	Select Rac Select Sho Select Go Select Go Select Go Select Go	do bullion next to the performance element and standard(s) you want to view an we fly-journal ink-could belave the Christopive Input Indeal to refer to or could to level. Performance Element bullion at boltom right correr to go to the next per Back to Top of Page bullion at boltom right correr to go to the top of the provenia and Acknowledgments table og to Approvals and Acknowledgments page Back to Progress Performance and the progress Rev dance, select Need 19907	of enter input. and pasta any information for your progress review in formance element and standard(s). ge, iews page.	put.	
Perform	nance El	ements			
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12	5 Q -	3			
-	Order	Performance Element Title	Status	Performance Element Type	
	1	Supervisory	Approved	Critical	
	2	Employee Helators	Approved	Crista	
	4	LINERDA LINERDA	Arground	Critical	
			1.11.1.1.1	Received and a second sec	
Perform	nance El	ement and Standard(s)			
Exploy	Abirs perform A ansignment provides or provides or area and read the most of the Wardphildes act tasks are per- ree Input now My Jour R to 2000 chan	na man and an and a second and a second an angle of second and a secon	no man natural statu engineme range of the status of the s	nderster omsetter na di dens to enseur successy. Lusking omspontble and	
Rating	Official A	ssessment			
				· · · · · · · · · · · · · · · · · · ·	Go to Next Performance Element Gr

### **STEP 6**: When completed with all Employee Input click the "Go Back to Progress Reviews" button.

Revi	iew	s" button.			
rogress	Revie	ws Information area			
					Go Back to Progress Reviews
mployee	Inform	ation			
Employee M	lame mployee (	Details			
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Pro Pr Assessmen This s For a Perfol	gress Rer ogress R screen allo Select S Select S Select C Select C Select C Select C dditional g	view Initiator PRIHODA, TAMMY M view Status Initiated movals and Acknowledgments ws you to view your performance elements and standards and ado button next to the performance element and standards now My ournal link located below the Employee Input head to knext Performance Element button at botton right come provoils and Acknowledgments tab to go to Approvals and A to fact to Progress Reviews tutton at top right correr to go uidance, select Need Help? Elements	nd provide input. ) you want to view and enter ng to refer to or copy and par- tro go to the next performan- chronviedgments page. Acknovledgments page. Back to Progress Reviews pa	Progress Review Number 1 input. Is any information for your progress review input. e element and standard(s). ge.	
X 2	🖻 🥸	▼ 111			
	Order	Performance Element Title	Status	Performance Element Type	
۲	1	Supervisory	Approved	Critical	
0	2	Employee Relations	Approved	Critical	
0	3	Employee Benefits	Approved	Critical	
0	4	USERRA	Approved	Critical	

**STEP 7**: Select the "—Choose an Action—" drop-down menu and select "Transfer to Rating Official". Hit "GO".

	Appraisal Pi	ogram					MyBiz+	Help	·
Progress Revie	ews Annual Appraisal Nam	ative Statements View/P	rint Form					Ľ	
							Transfer to Rating	Official	
ployee mon	mauon								
loyee Name									
iyee Name	Details								
how Employee D	Details u to create, update or view com	pleted progress reviews. Pr	rogress Reviews are performance discussio	ins that must be doc	umented in the MyPerformance tool	Employees must have at least one docum	anted progress review which typically occ	curs midway through t	he performance
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**STEP 8**: Select "Transfer to Rating Official with E-mail Notification". *Note: It is optional to put a message to the RO in this section.* 

Employee Notification to Rating Official -		
	Cancel Transfer to Rating Official without E-mail	Notification Iransfer to Rating Official with E-mail Notification
Message to Rating Official		
This screen allows you to send a message to your Rating Official (RO) regarding your performance plantappraisal. The notification can be sent with or without an email mess • To provide additional information to the RO, enter a message in the tent how below Message to Rating Official and select Transfer to Rating Official with E-mail Notific • If you choose not to send a message, select Transfer to Rating Official without F-mail Notification button. You will need to contact the RO directly. • Select Cancel button at for myforcemer to go action to previous Sereen without making any changes.	a. In button at top right corner.	
For additional guidance, select Need Help?		
Spell C	:k	
Notice: You are about to contact SCHWEICKERT, JR, JOSEPH J by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public	nformation such as social security numbers or privacy act	t information in your e-mail.

**STEP 9**: Supervisor will complete Rating Official Assessment and return to employee for acknowledgement.

**STEP 10**: Upon receipt of Progress Review from the RO, go to Progress Review-Approvals and Acknowledgements Tab. Click "Start" next to Step 4: Employee Acknowledgement. Acknowledge the Progress Review to finalize.

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 aga
Progress Review Initiator       PRIHODA, TAMMY M         Progress Review Status       Initiated         Assessments       Approvals and Acknowledgments         This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.         • Select Show All Details link to see astraw information (date, method, etc.) and Hide All Details link to collapse all steps.         • Select Show All Details of the or seach step and select 4 icon to collapse estep.         • Select Show All Details Inthe or see approval and/or communication information or the employee's progress review.         • Select Show All Details Inthe or see approval and/or communication information or the explose and select 4 icon to collapse estep.         • Select Show All Details Inthe or see approval and/or communication information for each step and select 4 icon to collapse estep.         • Select Show All Details Inthe or see approval and/or communication information or each step and select 4 icon to collapse estep.         • Select Show All Details Inthe or Progress Reviews button at top right comer to go back to Progress Reviews page.         • Select Show All Details Inthe order Step and select 4 icon to collapse estep.         • Select Show All Details Inthe order Step and select 4 icon to collapse estep.         • Select Show All Details Inthe order Step and select 4 icon to collapse estep.         • Select Show All Details Inthe order Step and select 4 icon to collapse estep.         • Select Show All Details Inthe Order Step and s
Assessments       Approvals and Acknowledgments         This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.         • Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse al steps.         • Select Show All Details link to see approval and/or communication information of seech step and select 4 icon to collapse at steps.         • Select Show All Details link to see approval and/or communication information of seech step and select 4 icon to collapse at steps.         • Select Start button under Action column for Steps 1 (if required) or 3, if available.         • Select Start button under Action column to pright corner to go back to Progress Reviews page.         For additional guidance, select. Need Help?
This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.  Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps. Select Show Julion under Action communication information for each step and select al icon to collapse step. Select Start button under Action common for Steps 1 if evaluable. Select Start button under Action common for genes 1 if evaluable. Select Start button under Action common for genes 1 if evaluable. Select Start button under Action common for genes 1 if evaluable. Select Start button under Action common for genes 1 if evaluable. Select Start button set to progress Reviews page. For additional guidance, select Need Help?
Show All Details   Hide All Details
Details Tasks Status Action
Step 1: Rating Official - Request or Document Higher Level Review (if required) Not Started Start
Step 2: Higher Level Reviewer - Review (if required) Not Started Not Started
Step 3: Rating Official - Document Communication to Employee         Not Started         Start
Step 4: Rating Official - Document Employee Acknowledgment         Not Started

### STEP BY STEP: HOW TO COMPLETE A PROGRESS REVIEW- Supervisor

### **STEP 1**: DCPDS Portal – Login

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

**STEP 1**: Login to your MyBiz+ Homepage. Find KEY SERVICES, under "Manager Functions" Click on "Performance Management and Appraisal"

Note: Your homepage may look different due to varying permissions within MyBiz+.

Welcome,	The information is current as of 17-Jun-20
Home	
# Key Services	Sther DCPI
Manage K	Key Services P DCPDS Navigat
MyPerformance	Add HR Region
Request Employment Verification	
Update Contact Information	🐔 Last Persor
Civilian Career Report	Type of Action:
Update Professional Development	Effective Date:
SF50 Personnel Actions	
Update MySupervisor	
Civilian Career Brief	
Manager Functions	
Performance Management and Appraisal	
Apply Action(s) to Multiple Employees	
Manage MyPerformance Trusted Agent Authorizati	lion
View/Print Performance Management Reports	
View Previous Requests	

**STEP 2**: If the employee provides a self-assessment, find "Action" category and select "Update" from the drop-down menu. Hit "GO". *Note: If the employee chooses not to give a self-assessment, find the "Action" category and select "Retrieve" from the drop-down menu. Hit "Go". Then from the same menu select "Update" and Hit "Go".* 

tant: To become familiar with the columns, select the 'Need Help?' link.									
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IP Only Employees that have a plan in progress are listed below.									
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	2023	328083	06-Apr-2022	DoD	Approved	Plan Approved	Change RO and/or HLR Track Progress		Go
	2023	326972	05-Apr-2022	DoD	Approved	Plan Approved	View	~	Go

Select the link to search for Completed Plans.

### STEP 3: Click "Acknowledge"

🔒 Confirmation		Acknowledge
	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 communication; monitor and evaluate employee performance, recognize and reverd performance, and appropriately address deficient performance.	

### **STEP 4**: Select "Progress Reviews" tab.

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p 1: Plan Details Sta	Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments
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his screen allows you to	view and change the details of your performance plan/appraisal.
ton di Eline Detaile	
step 1. Plan Details	
Verify the appraisa     Select Save and C	i dates and rating official and higher level reviewer names are correct, and, if applicable, make the necessary changes. ontinue button at the bottom right corner to move to Step 2: Mission Goals.

**STEP 5**: Only complete this step if the employee did not do a self-assessment. Click "Create Progress Review" button.

Plan	Progress Reviews	Annual Appraisal Narrat	ive Statements View/Pri	nt Form						
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• •	Show Employee Detai	s								
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	<ul> <li>Select Create Prog</li> <li>Select Update butto</li> <li>Select View History</li> </ul>	ess Review button to create n under Action column to up button under Action column	a progress review. date a progress review. to view a completed progr	ess review.						
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								Create Progress Review	1 🕱 🗃 🖬	3 🐇
	Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	De
	No results found.									

**STEP 6:** Provide performance feedback under "Rating Official Assessment" and click "Go to Next Performance Element". Complete "Rating Official Assessment" for each Performance Element.

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					Go to Next Performance Element C

**STEP 7**: Upon completion of performance element feedback for all performance elements, click on the "Approval and Acknowledgements" tab. *To obtain HLR approval (optional), find Step 1: Rating Official Request or Document Higher Level Reviewer and click "Start". Then click "Transfer to Higher Level Reviewer with Email Notification". Progress Review then transfers to the HLR for approval and return to the RO.* 

snow Employee Details
 Progress Review Information

A progress review should acknowledge achievements to date and suggested areas provement. The supervisor and employee should engage in meaningful communications throughout the appraisal cycle to assess performance against the performance elements and standar									
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### **STEP 8**: To move the Progress Review directly to the employee, find Step 3: Rating Official- Document Communication to Employee and click "Start".

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**STEP 9:** Insert Communication Date, Method and Click "Save and Transfer for Acknowledgement



**STEP 10:** Employee must complete the final step of acknowledging the plan under Step 4: Employee Acknowledgement.

### **ANNUAL APPRAISAL- THE BASICS**

<u>Annual Appraisals</u>. Each permanent and indefinite employee shall be rated annually. The appraisal period for all on-board NG employees begins 1 April and ends 31 March each year. The end-of-year appraisals shall be completed by NLT 31 May of each calendar year. The effective date is 01 June.

Probationary/Trial Period employees cannot be subject to an official performance appraisal rating until they have completed 12 months of Federal Service. The effective date of the appraisal shall be 60 days after the rating period ends. After the first appraisal, probationary/trial period employees move to the 1 April to 31 March annual appraisal period as appropriate. If an employee has less than 90 days following their probationary period that period should be included in the next appraisal period. For example, an employee's probationary period is 20 January 2022 to 19 January 2023, the follow-on appraisal period is 20 January 2023 to 31 March 2024.

Appraisal dates may be partial-year due to LWOP/AUS or job changes.

**Postponement of Annual Appraisals.** In rare instances, the annual performance appraisal may be postponed (with documentation of circumstances).

### Staff Responsibilities:

<u>Rating Officials (RO) (*Supervisors*)</u>: The supervisor is responsible for completing the employee's annual appraisal. Once completed, the RO will forward to the Higher-Level Reviewer for approval and is also responsible for documenting employee acknowledgement once completed.

NOTE: RO should request employee to provide a self-assessment. If employee does not provide self-assessment within a reasonable timeframe the supervisor should retrieve the plan/appraisal, and note the employee declined to provide employee feedback.

<u>Higher Level Reviewer (HLR) (*At least one Level Higher than the Supervisor*): The Higher-Level Reviewer will review and approve the annual appraisal. Once the appraisal is approved it cannot be edited. If changes are needed the appraisal should be returned to the RO prior to approval.</u>

NOTE - Only The Adjutant General can serve as both RO and HLR for the same employee.

<u>Employee</u>: The employee should provide a self-assessment and transfer to the RO. Upon receipt of annual appraisal employee is to acknowledge the progress review.

#### Ratings:

<u>Level 5 – Outstanding</u>. Average score of all critical elements with a performance rating of 4.3 or above with no critical element rated at 1 will result in an overall rating of record of 5.

<u>Level 3 – Fully Successful</u>. Average score of all critical elements is less than 4.3 with no critical element being rated at 1 will result in an overall rating of record of 3.

<u>Level 1 – Unacceptable</u>. Any critical element rated as 1 will result in an overall rating of record of 1. An appraisal with any element rated as 1 will require a follow-up Performance Improvement Plan.

### STEP BY STEP: HOW TO COMPLETE AN ANNUAL APPRAISAL- Employee

DCPDS Portal – Login https://compo.dcpds.cpms.osd.mil/

**STEP 1**: Login to your MyBiz+ Homepage. Click "My Performance" under KEY SERVICES.

Note: Your homepage may look different due to varying permissions within MyBiz+.

Welcome,	The information is current as of 17-Jun-20
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Civilian Career Brief	
Manager Functions	
Performance Management and Appraisal	
Apply Action(s) to Multiple Employees	
Manage MyPerformance Trusted Agent Authorization	n
View/Print Performance Management Reports	
View Previous Requests	

**STEP 2**: Find "Action" category and select "Update" from the drop-down menu. Hit "GO".

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### STEP 3: Select "Annual Appraisal" tab.

Pla	n Progress Reviews Annual Appraisal Narrative Statements View/Print Form							
	Step 1: Plan Details Step 2: Mission Goals Performance Elements and Standards Step 4: Approvals and Acknowledgments							
	Employee Information Employee Name							
	This screen allows you to view and change the details of your performance plan/appraisal.							
	<ul> <li>Verify the appraisal dates and rating official and higher level reviewer names are correct, and, if applicable, make the necessary changes.</li> <li>Select Save and Continue button at the bottom right corner to move to Step 2: Mission Goals.</li> </ul>							
	TIP: Choose an Action – located at the top right corner – allows for selection of other actions throughout the performance cycle.							

For additional guidance, select Need Help?

**STEP 4**: Provide Self-assessment under the Inputs and Ratings Tab under "Employee Input" and click "Go to Next Performance Element". Complete "Employee Input" on each Performance Element.

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**STEP 5**: Select the "—Choose an Action—" drop-down menu and select "Transfer to Rating Official". Hit "GO".

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**STEP 6**: Select "Transfer to Rating Official with E-mail Notification". *Note: It is optional to put a message to the RO in this section.* 

Employee Notification to Rating Official -			
	Cancel	Transfer to Rating Official without E-mail Notification	Iransfer to Rating Official with E-mail Notification
Message to Rating Official			
This screen allows you to send a message to your Rating Official (RO) regarding your performance plan/appraisal. The notification can be sent with or without an email messag	9.		
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For additional guidance, select Need Help?			
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**STEP 7**: **Supervisor** will complete Rating Official Assessment, route to Higher Level Reviewer for approval and return to employee for acknowledgement.

**STEP 8**: Upon receipt of Annual Appraisal from the RO, go to Annual Appraisal-Approvals and Acknowledgements Tab. Click "Start" next to Step 4: Employee Acknowledgement. Acknowledge the Annual Appraisal to finalize.

Thi	a screen allows you to start the approval and/or communication process or view status information of the employee's progress review.		
	Select Sheek All Details link to see status information obde, method, etc.) and Hide All Details link to collapse all plags.     Select 3 : con under Details couring to see approve and/or communication from each shee and select in kon to collapse step.     Select 3 and full under under All details information (or each shee) and select in kon to collapse step.     Select 3 and full under under All details information (or each shee) and select in kon to collapse step.     Select 3 and full under under under the fully control of regardle 1, 3, 4 existence     Select 3 and the Progress Reviews button all for right control to patient to patient to Progress Reviews page.		
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### STEP BY STEP: HOW TO COMPLETE AN ANNUAL APPRAISAL- Supervisor

### **STEP 1**: DCPDS Portal – Login

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

**STEP 1**: Login to your MyBiz+ Homepage. Find KEY SERVICES, under "Manager Functions" Click on "Performance Management and Appraisal"

Note: Your homepage may look different due to varying permissions within MyBiz+.

Welcome,	The information is	s current as of 17-Jun-202
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Update MySupervisor		
Civilian Career Brief		
Manager Functions		
Performance Management and Appra	isal	
Apply Action(s) to Multiple Employees	÷	
Manage MyPerformance Trusted Age	nt Authorization	
View/Print Performance Management	Reports	
View Previous Requests		

**STEP 2**: If the employee provides a self-assessment, find "Action" category and select "Update" from the drop-down menu. Hit "GO". *Note: If the employee chooses not to give a self-assessment, find the "Action" category and select "Retrieve" from the drop-down menu. Hit "Go". Then from the same menu select "Update" and Hit "Go".* 

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	2023	328483	07-Apr-2022	DoD	Approved	Plan Approved	Retrieve View/Print Form		Go
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	2023	326972	05-Apr-2022	DoD	Approved	Plan Approved	View	v	Go

Select the link to search for Completed Plans.

### STEP 3: Click "Acknowledge"

Confirmation		Acknowledge
-	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 communication; monitor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	

### STEP 4: Select "Annual Appraisal" tab.

Plan	Progress Reviews	Annual Appraisal	Narrative Statements Vi	ew/Print Form	
s	tep 1: Plan Details	Step 2: Mission Go	als erformance	Elements and Standards	Step 4: Approvals and Acknowledgments
E	mployee Inform	nation	•		
	Employee Name F	RIHODA, TAMMY N	1		
	Show Employee	Details			
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	Step 1: Plan Details				
	<ul> <li>Verify the app</li> <li>Select Save a</li> </ul>	raisal dates and rati Ind Continue button	ng official and higher level re at the bottom right corner to	viewer names are correct, move to Step 2: Mission G	and, if applicable, make the necessary changes. oals.
	TIP: Choose an Actio	n – located at the to	p right corner – allows for se	lection of other actions thre	pughout the performance cycle.
	For additional guidan	ce, select Need He	.p?		

**STEP 5:** Provide performance feedback under "Rating Official Narrative" and click "Go to Next Performance Element". Complete "Rating Official Narrative" for each Performance Element.

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**STEP 6**: Upon completion of performance element feedback for all performance elements, click on the "Approval and Acknowledgements" tab. To obtain HLR approval, find Step 1: Rating Official Request or Document Higher Level Reviewer and click "Start". Then click "Transfer to Higher Level Reviewer with Email Notification". Progress Review then transfers to the HLR for approval and return to the RO.

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**STEP 7:** HLR will clock on "Approvals and Acknowledgements" tab and click "Start" next to the Step 2: Higher Level Reviewer. HLR will complete the approval process and return the approved appraisal to the RO.

**STEP 8:** Once RO receives approved appraisal, return to Approvals and Acknowledgement Tab and Go to Step 3. Insert Communication Date, Method and Click "Save and Transfer for Acknowledgement



**STEP 9:** Employee must complete the final step of acknowledging the Appraisal under Step 4: Employee Acknowledgement.

### **FREQUENT ASKED QUESTIONS**

### Q: Does the effective date of the performance plan/appraisal have any impact on the employee?

A: The effective date of the appraisal is the date the appraisal rating is effective on the employee record. Incentive award submission deadlines are based on the effective date. For example: Sustained Superior Performance (SSP) Awards must be submitted to HRO within 90 days of the effective date and Quality Step Increase (QSI) Awards must be submitted to HRO within 30 days of the effective date.

### Q: Who is the proper person to fill the role of HLR?

A: The HLR should be one level higher than the RO. For employees whose immediate supervisor is TAG, TAG serves as both RO and HLR. No other exceptions are authorized.

### Q: What is the role of the HLR?

A: The role of the HLR is to review and approve ratings of record and performance decisions. Ensures rating officials execute the performance management process within the established guidelines and timelines. The HLR may also approve performance plans established by the RO for the employee.

### Q: What if there is a change in Supervisor?

A. Plans may be changed during the appraisal period but must be reapproved. Newly assigned ROs and HLRs may approve performance documents. Input from all applicable supervisors for the rating period should be considered in the performance narratives and appraisal.

### Q: I have a new employee and there is not 90 days left in the rating period, how do I date their plan?

A. If there is not enough time to have an approved plan for 90 days within the rating period, include that short period of time in the next appraisal year. For example: If you have a new employee who started 14-Feb-2022, the plan year should be 14-Feb-2022 through 31-Mar-2023 with the effective date of 01-Jun-2023.

### Q. I am giving my employee an unacceptable rating of record, what do I do?

A. RO must issue a Performance Improvement Plan (PIP) to an employee when issuing an unacceptable rating of record. Contact HRO-ERS for guidance prior to taking action.

### **10 THINGS TO CONSIDER**

- 1. Personalize your feedback. Avoid copy and pasting for multiple employees.
- 2. Give substantiated feedback. Provide examples.
- 3. Avoid one-liners.
- 4. Do not skip HLR review on annual appraisals.
- 5. Watch for spelling errors and sentence structure.
- 6. Remember to reward deserving employees.
- 7. Always give employees a chance to provide input into their performance elements and standards.
- 8. You can give more than one progress review throughout the year. This is a good way to document performance success, opportunities and feedback.
- 9. Plans, progress reviews and annual appraisals will not show as complete unless the employee acknowledges.
- 10. As a supervisor it is your responsibility to ensure your employees are taken care of!