Narrative Statement Overview for Employee

A narrative statement is a brief narrative description of an employee’s performance, accomplishments and contributions during the current appraisal period when it is known that the rating official ceases to exercise duties resulting from a job change by the rating official or the employee. A narrative statement is not a rating of record.

When is a Narrative Statement Prepared?

The length of time an employee serves under an approved performance plan determines what is required when an employee or supervisor leaves the organization.

A narrative statement is required if an employee has:

- been assigned to a specific supervisor.
- performed under an approved performance plan for 90 calendar days.
- more than 90 calendar days left in the appraisal cycle.

Who Participates in a Narrative Statement?

- A rating official will:
  - indicate the start date and end date of the period being assessed.
  - prepare a rating official assessment specifically for the narrative statement.
  - document communication of the narrative statement to the employee.

- An employee will:
  - prepare an employee input (voluntary but strongly encouraged) specifically for the narrative statement.
  - acknowledge the narrative statement.

Creating a Narrative Statement

Steps to Create a Narrative Statement

1. On the MyPerformance Main Page, select the performance plan you want to create a narrative statement for, make sure Action column reflects Update and select Go button. You must have ownership of the approved performance plan to make any changes.

   NOTE: The Current Status is Plan Approved.
2. The **Step 1: Plan Details** page is displayed as pictured below in Figure 2. Select the **Narrative Statements** tab to create your narrative statement. If you need to get out of the tool at this time, you should select the **Choose an Action** list of values (LOV) drop down arrow, select **Return to Main Page**, followed by **Go** button.

3. The **Narrative Statements** page is displayed as pictured in Figure 3. Select the **Create Narrative Statement** button to create a narrative statement.
4. An Information message will display as pictured below. Select No to go back or Yes to proceed with the creation of the narrative statement.

5. The Create/Update Narrative Statement page is displayed. There are two sub tabs on this page: Assessments and Communication and Acknowledgments.

6. Employees can provide written input about their performance accomplishments for supervisors to consider in evaluating each of the performance elements and overall performance accomplishments. Select the radio button next to the performance element and standards you want to enter your input. The Show My Journal link allows you to cut and paste any information you entered to track your job accomplishments during the appraisal period.
Table 1 - Decision Table for Narrative Statement

<table>
<thead>
<tr>
<th>If You….</th>
<th>Then…..</th>
</tr>
</thead>
<tbody>
<tr>
<td>Want to go to the next performance element to enter your input</td>
<td>Select the Go to Next Performance Element button</td>
</tr>
<tr>
<td>Want to go back to the top of the page after you have finished with your input</td>
<td>Select Go Back to Top of the Page button</td>
</tr>
</tbody>
</table>
7. At this point you have completed your narrative statement and are ready to transfer it to the rating official for review. There is no further action for you at this time on the Communication and Acknowledgments tab. Select Go Back to Narrative Statements button to return to the Narrative Statements tab.

8. Your initiated narrative statement is now displayed in the table. At this point, you can update or delete your narrative statement.

NOTE: There can only be one narrative statement in progress.

9. To transfer your performance plan/appraisal to the rating official, first select Choose an Action LOV drop down arrow depicted in the red box below. Second, select Transfer to Rating Official. Lastly select the Go button to the right.
10. 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.
11. 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/appraisal is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page* as pictured in Figure 12. You no longer have ownership and can only view your performance plan/appraisal.

**NOTE:** The current status is Narrative Statement in Progress.

![Figure 12 - MyPerformance Main Page>View Narrative Statement in Progress](image)

**Reviewing and Editing Performance Input for Narrative Statement**

After the narrative statement has been created by either you or your rating official, it may require edits and further input from either you or your rating official. Your edits can only be for the employee input.

**Steps to Review and Edit Narrative Statement**

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

**NOTE:** The Current Status is Narrative Statement in Progress.
2. The *Plan Details* page is displayed as pictured below in Figure 14. Select *Narrative Statements* tab to update your narrative statement.

3. The *Narrative Statements* page is displayed as pictured in Figure 15. Select the *Update* button under the *Action* column to edit your narrative statement input.
4. The Create/Update Narrative Statements page is displayed. Select the radio button next to the performance element and standards you want to edit your input.
5. At this point you have made all of the changes for your performance and are ready to transfer it to the rating official for review. There is no action for you, the employee, on the Communications and Acknowledgments tab. Select Go Back to Narrative Statements button to return to the Narrative Statements tab.

6. To transfer your performance plan/appraisal to the rating official, first select the Choose an Action LOV drop down arrow depicted in the red box below. Second, select Transfer to Rating Official. Lastly select the GO button to the right.

7. 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.

![Image of Employee Notification to Rating Official](image1)

Figure 20 – Narrative Statements > Employee Notification to Rating Official

8. 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.

**NOTE:** The Current Status is Narrative Statement in Progress.

![Image of MyPerformance Main Page](image2)

Figure 21 - MyPerformance Main Page > View Narrative Statement in Progress

**Acknowledging Receipt of Narrative Statement**

After the rating official has finalized his narrative statement assessments and rating official has documented communication to employee, he or she will transfer the performance plan/appraisal to you. You will acknowledge that the rating official discussed your work performance and its link to organizational effectiveness. Acknowledging the narrative statement was communicated to you does not mean you agree with it; you are merely acknowledging it was communicated to you by your supervisor.
As described earlier, the typical steps in the narrative statement process are as follows. The steps covered in this section are bold and italicized:

1. The employee or rating official creates the narrative statement, transfers to employee to enter input, and rating official enters performance narratives for each performance element and standard(s).

2. The employee and rating official edit and/or add to the input and/or performance narratives as needed. This process may involve multiple rounds of editing and transfers between the employee and rating official before the narrative statement is communicated to the employee.

3. The rating official documents communication to employee and transfers the narrative statement to the employee for acknowledgment.

4. *The employee reviews the narrative statement and acknowledges that it was communicated to him or her by the rating official.*

Table 2: Narrative Statement Communication and Acknowledgment Steps

The below table provides the steps to be taken for documenting communication of the narrative statement to the employee and employee acknowledging receipt.

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Performer</th>
<th>Approval Step</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rating Official</td>
<td>Document Communication to Employee</td>
<td>Not Started</td>
<td>RO has entered communication method and date and transferred to the employee or proceeded to Step 4</td>
</tr>
<tr>
<td>2</td>
<td>Employee or Rating Official</td>
<td>Document Employee Acknowledgment</td>
<td>Not Started</td>
<td>Employee acknowledged receipt or RO has entered communication method and date</td>
</tr>
</tbody>
</table>
Steps to Acknowledge Receipt of Narrative Statement

1. At the MyPerformance Main Page, select the performance plan/appraisal that needs to have the narrative statement acknowledged, make sure Action column reflects Update and select the Go button. You must have ownership of the performance plan to make any changes.

   NOTE: The Current Status is Narrative Statement in Progress.

![MyPerformance Main Page](image1)

   Figure 22 - MyPerformance Main Page>Update Narrative Statement in Progress

2. The Plan Details page is displayed as pictured below in Figure 23. Select Narrative Statements tab to acknowledge receipt of your narrative statement.

![Plan Details](image2)

   Figure 23 – Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab

3. The Narrative Statements page is displayed as pictured in Figure 24. Select the Update.
4. Before you acknowledge receipt, you will be able to view the rating official assessments on each of your performance elements and standards by selecting the Assessments tab.

5. Select Communication and Acknowledgments tab to acknowledge receipt of narrative statement. Step 2: Employee – Acknowledgment under Details / Tasks shows pending employee acknowledgment and the Acknowledge Receipt button is available for selection. Select Acknowledge Receipt button.
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 26 - Create/Update Narrative Statement>Communication and Acknowledgments>Acknowledge Receipt Date](image1)

7. **Step 2: Employee – Acknowledgment** under Details / Tasks is completed. You have just successfully acknowledged receipt of your narrative statement. Select **Go Back to Narrative Statements** button to go back to **Narrative Statements** tab.

![Figure 27 - Create/Update Narrative Statement>Communication and Acknowledgments>Go Back to Narrative Statements](image2)
8. Since the narrative statement was acknowledged, the Narrative Statement is complete and the Action reflects View History. To return to the MyPerformance Main Page, first select Choose an Action LOV drop down arrow depicted in the red box below. Second, select Return to Main Page. Lastly select the Go button to the right.

![Figure 28 - Narrative Statements - View History and Choose Action>Return to Main Page](image)

9. At the MyPerformance Main Page, the Current Status reflects Narrative Statement Completed. Employee still has ownership of the performance plan/appraisal.

![Figure 29 - MyPerformance Main Page>Narrative Statement Completed](image)