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.
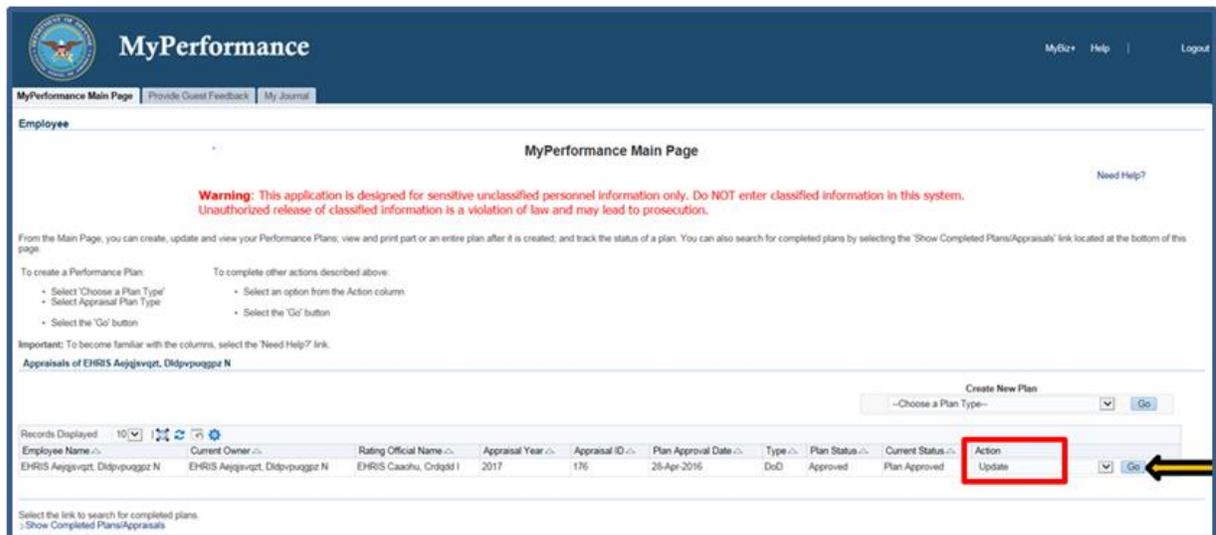
Figure 1 - *MyPerformance Main Page>Create Narrative Statement*

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.
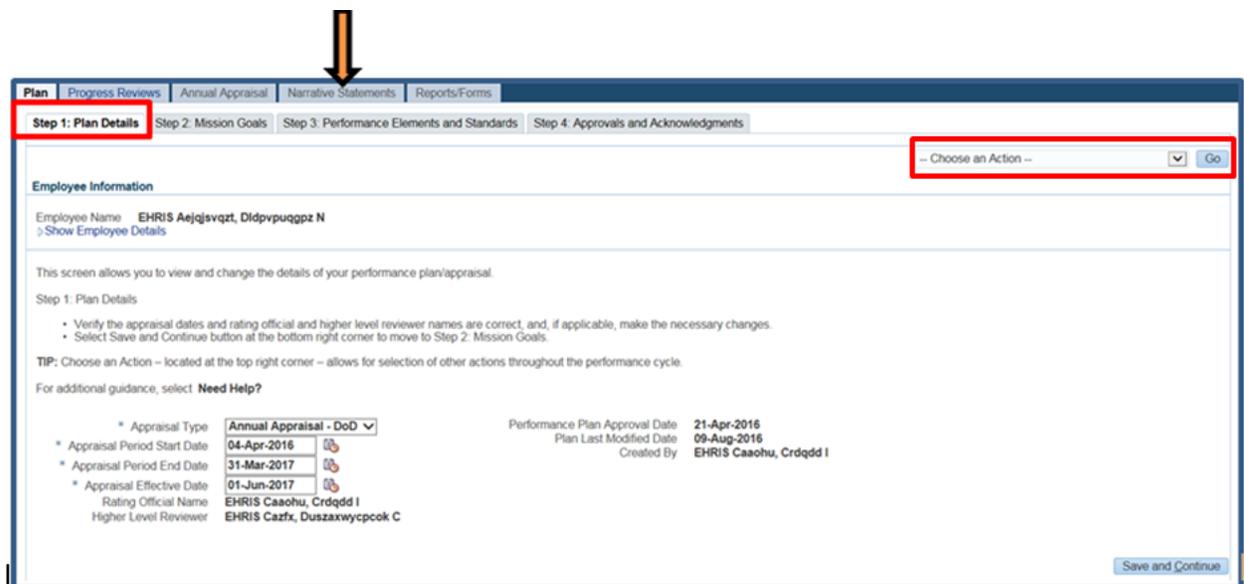
Figure 2 – *Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab*

3. The *Narrative Statements* page is displayed as pictured in Figure 3. Select the **Create Narrative Statement** button to create a narrative statement.
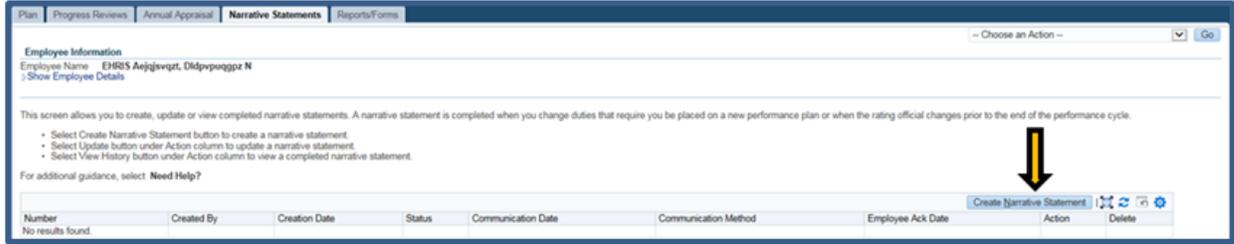
Figure 3 – *Narrative Statements>Create Narrative Statement*

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.

Figure 4 - *Information Message*

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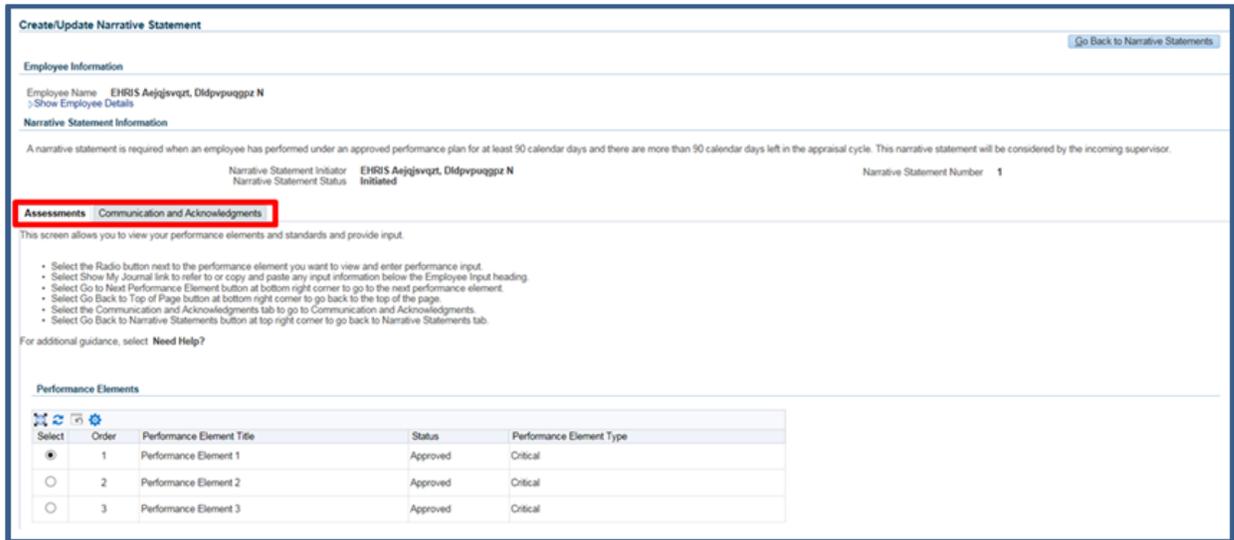
Figure 5 - *Create/Update Narrative Statement>Assessments and Communication and Acknowledgments*

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.

Create/Update Narrative Statement

Go Back to Narrative Statements

Employee Information

Employee Name   EHRIS Aejgjswgrt, Dfdpvpvqgpz N
> Show Employee Details

Narrative Statement Information

A narrative statement is required when an employee has performed under an approved performance plan for at least 90 calendar days and there are more than 90 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.

Narrative Statement Initiator   EHRIS Aejgjswgrt, Dfdpvpvqgpz N
Narrative Statement Status   **Initiated**

Narrative Statement Number   **1**

Assessments   Communication and Acknowledgments

This screen allows you to view your performance elements and standards and provide input.

- Select the Radio button next to the performance element you want to view and enter performance input.
- Select Show My Journal link to refer to or copy and paste any input information below the Employee Input heading.
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element.
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select the Communication and Acknowledgments tab to go to Communication and Acknowledgments.
- Select Go Back to Narrative Statements button at top right corner to go back to Narrative Statements tab.

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

Performance Elements

Select	Order	Performance Element Title	Status	Performance Element Type
●	1	Performance Element 1	Approved	Critical
○	2	Performance Element 2	Approved	Critical
○	3	Performance Element 3	Approved	Critical

Performance Element and Standard(s)

With minimal guidance, develop and recommend one feasible alternative process or long-term solution to recurring server-limitation problems by the end of the fiscal year. The recommendations should be unique from other existing solutions and be able to meet projected data storage needs over the next three years. That is, it should enhance the organization's ability to efficiently manage, organize, and store increasing amounts of data. Present recommendations in a briefing following the standard organizational format. Give a draft to your supervisor at least one month in advance of the due date and incorporate supervisor's feedback into the final briefing by the end of the fiscal year.

Employee Input

> Show My Journal

Enter input here. You have a limit of 2000 characters.

(Limit to 2000 characters)   Spell Check   Counter

Rating Official Assessment

Go to Next Performance Element   Go Back to Top of Page

Figure 6 - Create/Update Narrative Statement>Assessments> Enter Employee Input

Table 1 - Decision Table for Narrative Statement

If You….	Then…..
Want to go to the next performance element to enter your input	Select the Go to Next Performance Element button Go to Next Performance Element
Want to go back to the top of the page after you have finished with your	Select Go Back to Top of the Page button

input	Go Back to Top of Page

7. At this point you have completed your narrative statement and are ready to transfer it 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.

Figure 7 - Create/Update Narrative Statement>Communication and Acknowledgments>Go Back to Narrative Statement

8. Your initiated narrative statement is now displayed in the table. At this point, you can update or delete your narrative statement.
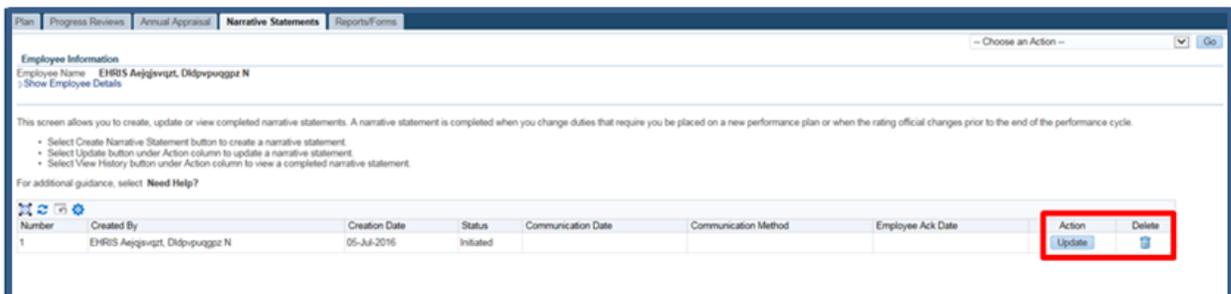
Figure 8 – Narrative Statements>Update/Delete Narrative Statement

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.
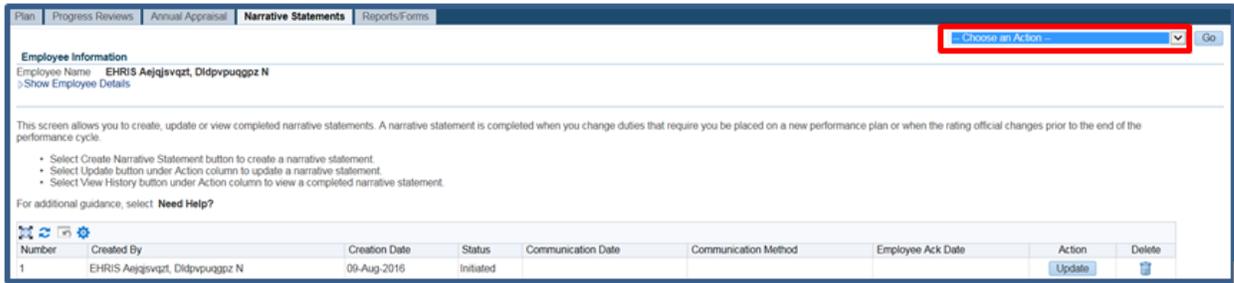
Figure 9 - *Narrative Statements>Choose an Action*
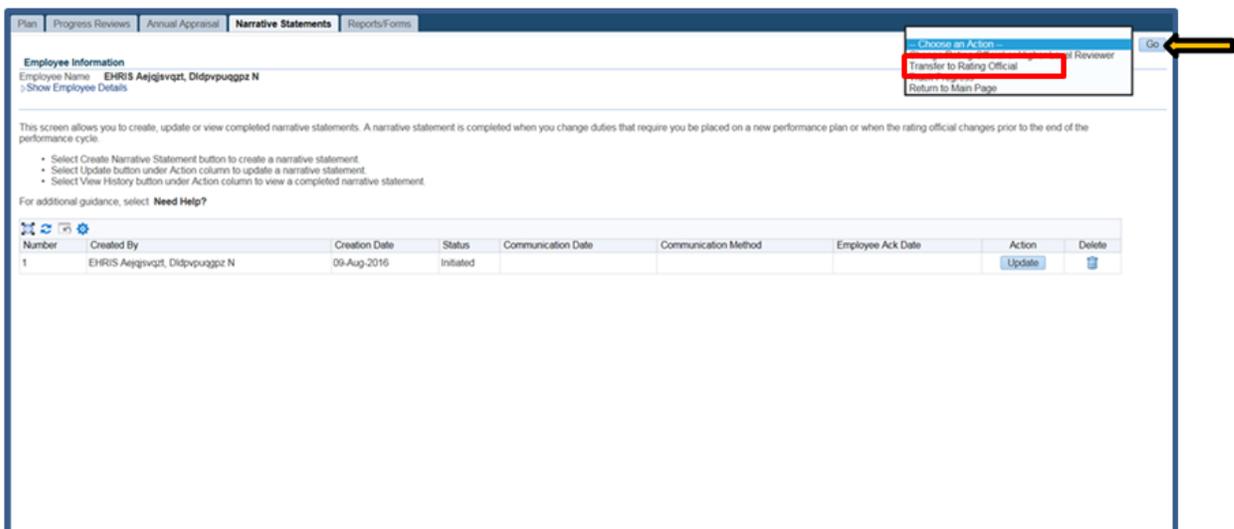
Figure 10 - *Narrative Statements>Choose an Action>Transfer to Rating Official*

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.
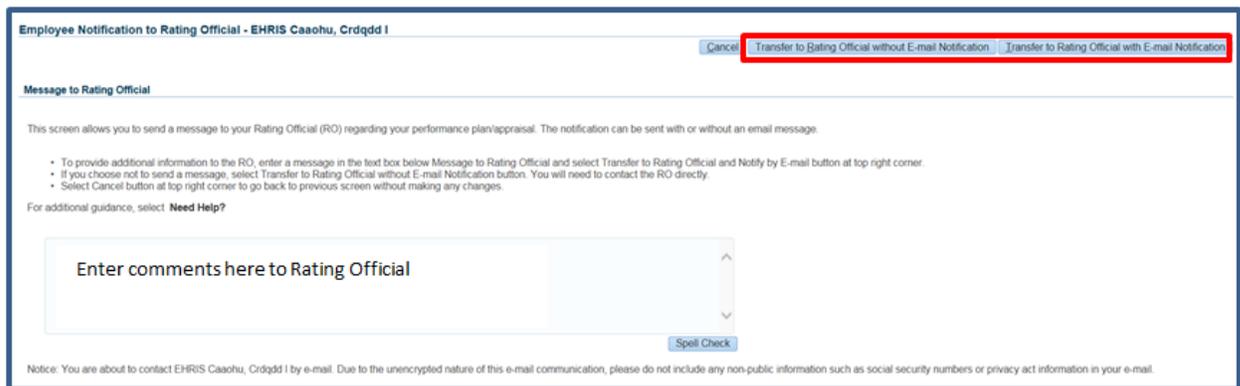
Figure 11 – *Narrative Statements>Employee Notification to Rating Official*

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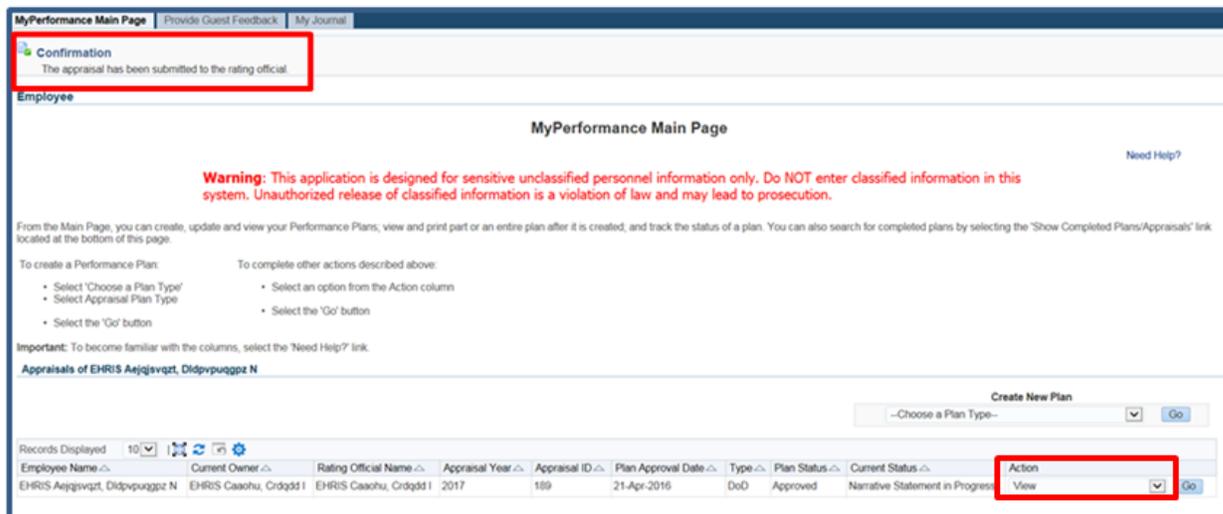
   NOTE: The current status is Narrative Statement in Progress.

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.
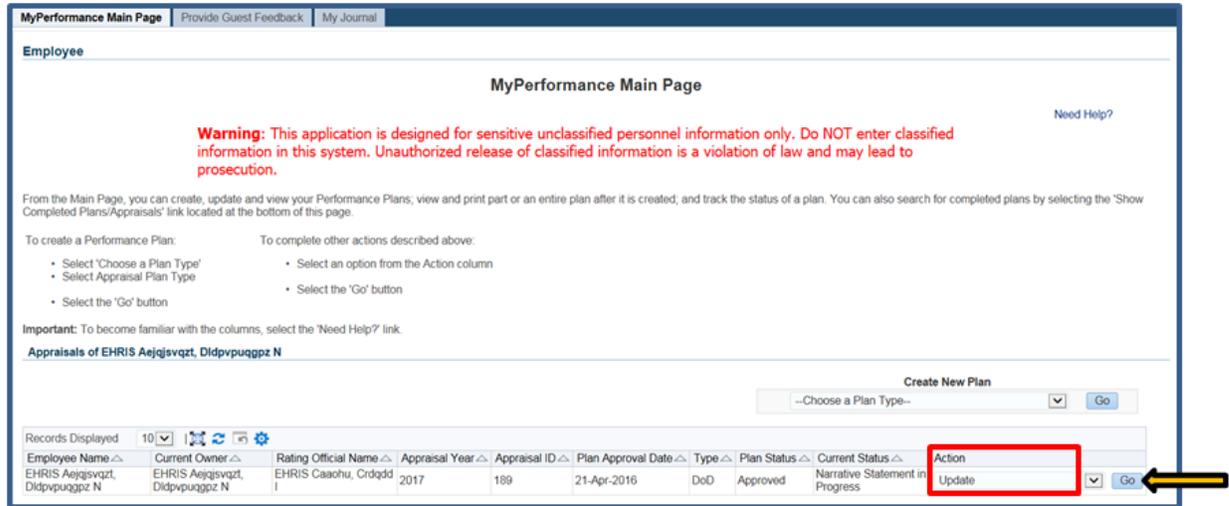
Figure 13 - *MyPerformance Main Page>Update Narrative Statement in Progress*

2. The *Plan Details* page is displayed as pictured below in Figure 14. Select *Narrative Statements* tab to update your narrative statement.
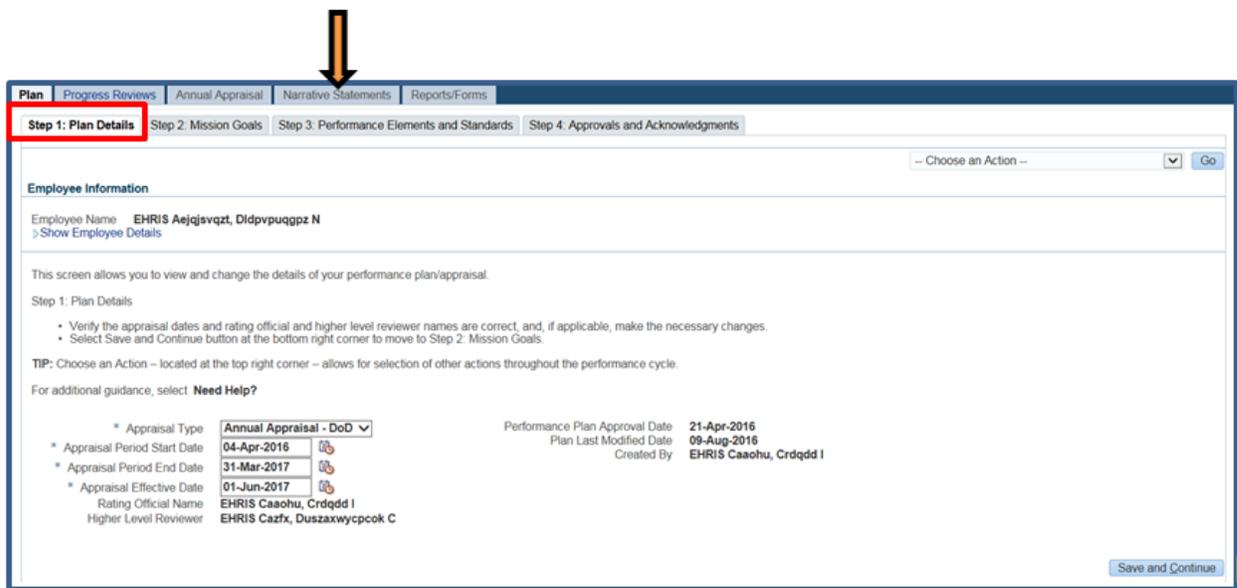
Figure 14 – *Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab*

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.
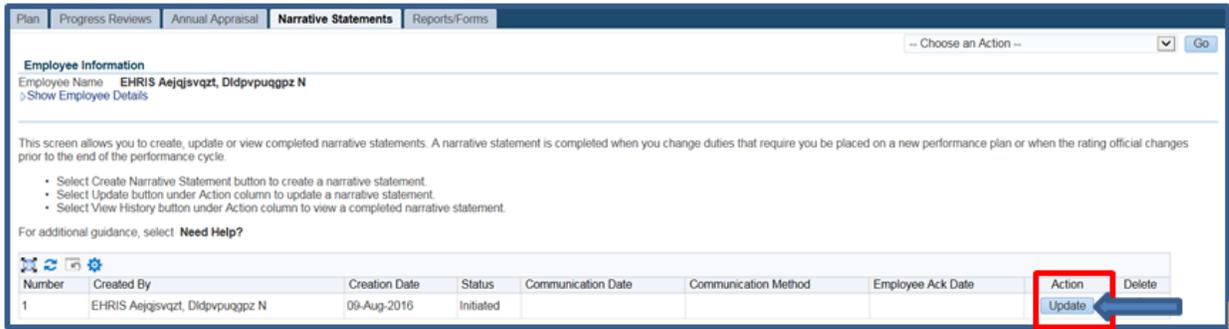
Figure 15 – *Narrative Statements>Update Narrative Statement*

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.
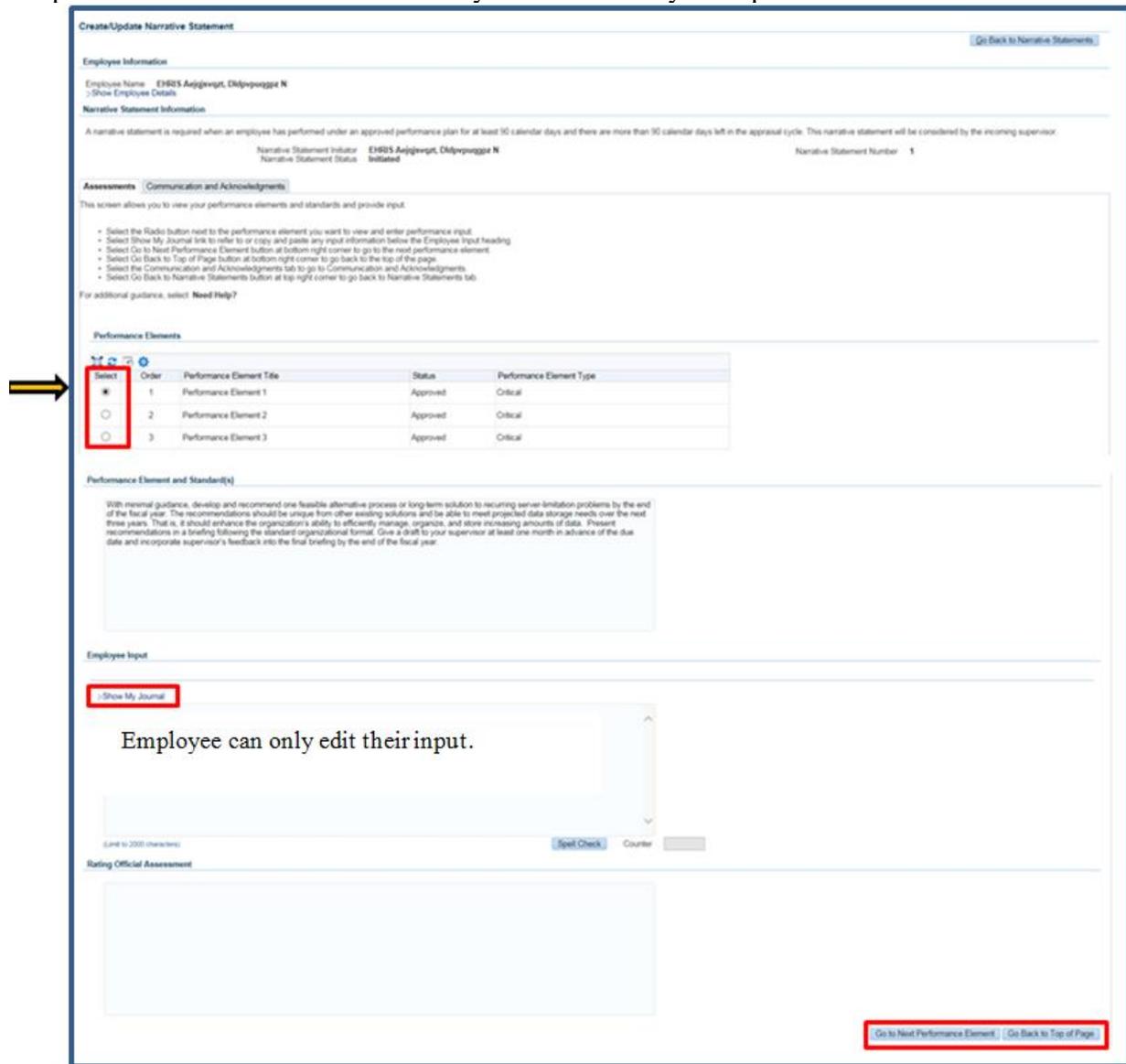
Figure 16 - *Create/Update Narrative Statement>Assessment>Update Employee Input*

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.
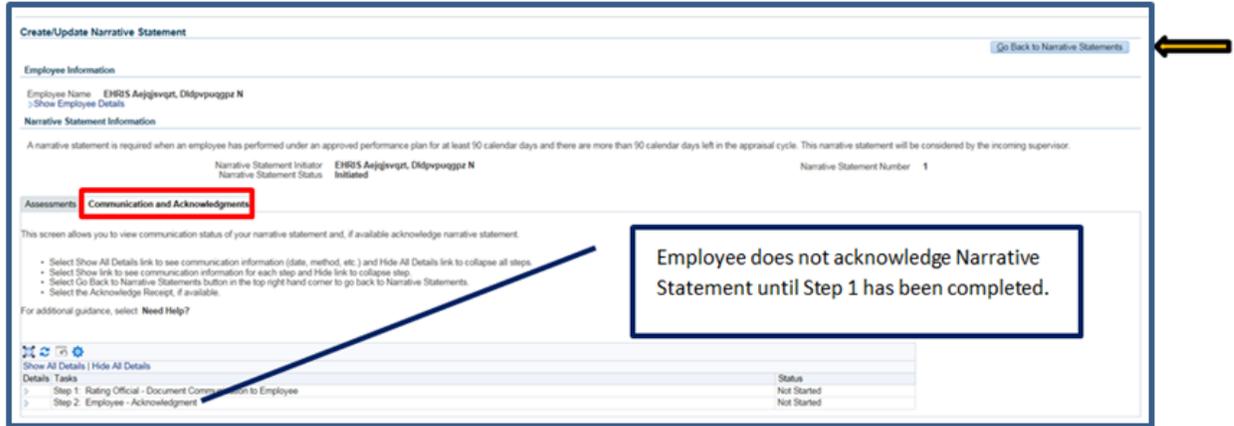
Figure 17 - *Create/Update Narrative Statement>Communication and Acknowledgments>Go Back to Narrative Statements*

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.
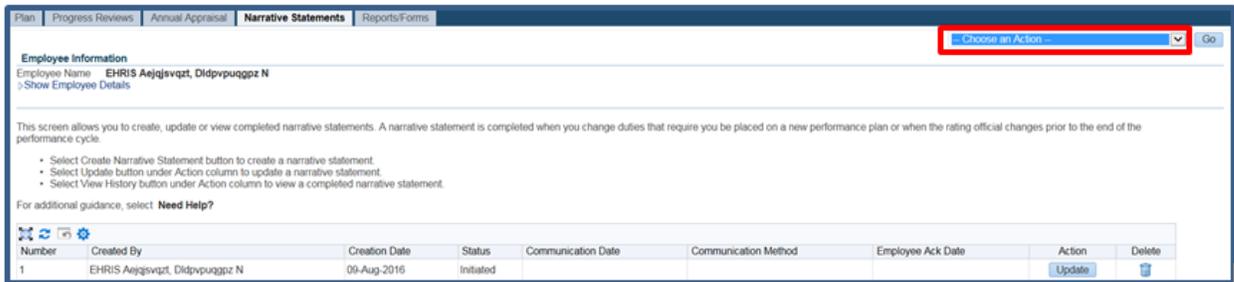
Figure 18 - *Narrative Statements>Choose an Action*
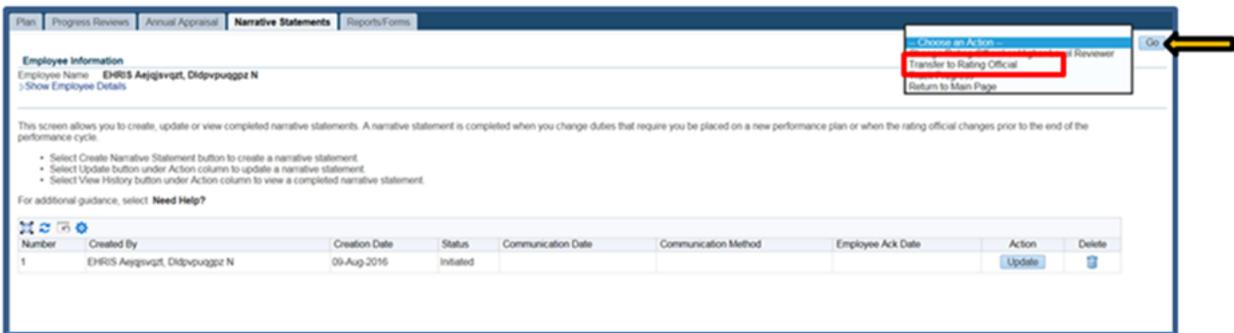
Figure 19 - *Narrative Statements>Choose an Action>Transfer to Rating Official*

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.
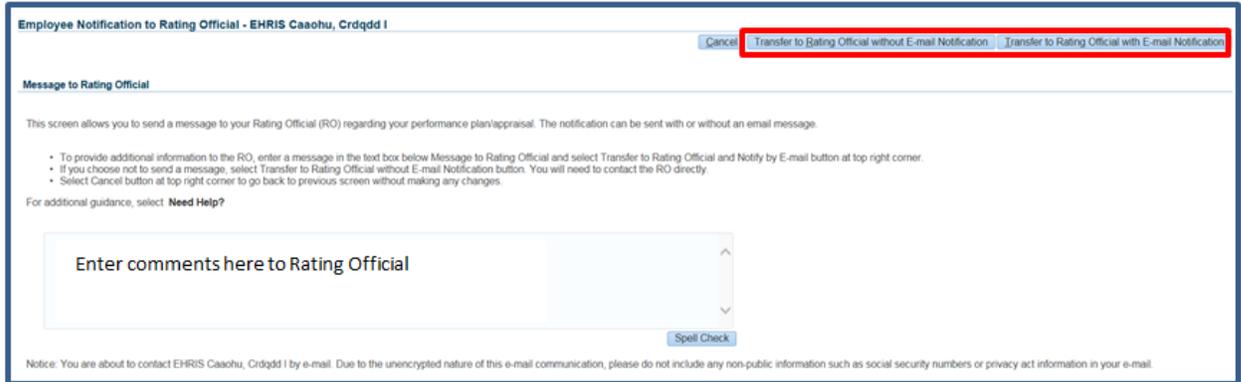
Figure 20 – *Narrative Statements>Employee Notification to Rating Official*

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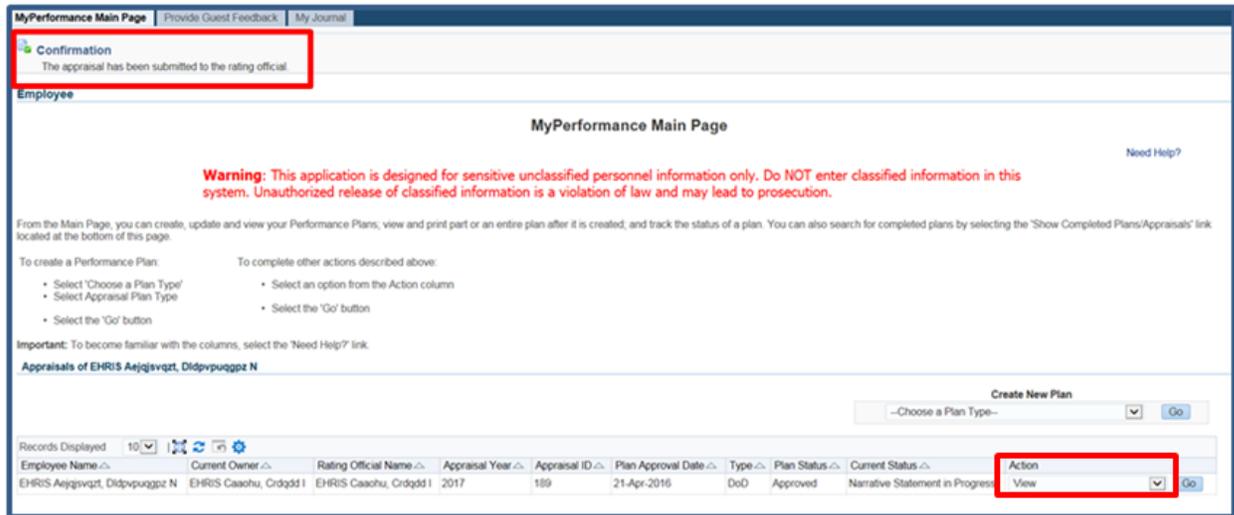
Figure 21 - *MyPerformance Main Page>View Narrative Statement in Progress*

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.

Communication and Acknowledgement Steps

Step Number	Performer	Approval Step	Status	Description
1	Rating Official	Document Communication to Employee	Not Started	
			Completed	RO has entered communication method and date and transferred to the employee or proceeded to Step 4
2	Employee or Rating Official	Document Employee Acknowledgment	Not Started	
			Completed	Employee acknowledged receipt or RO has entered communication method and date

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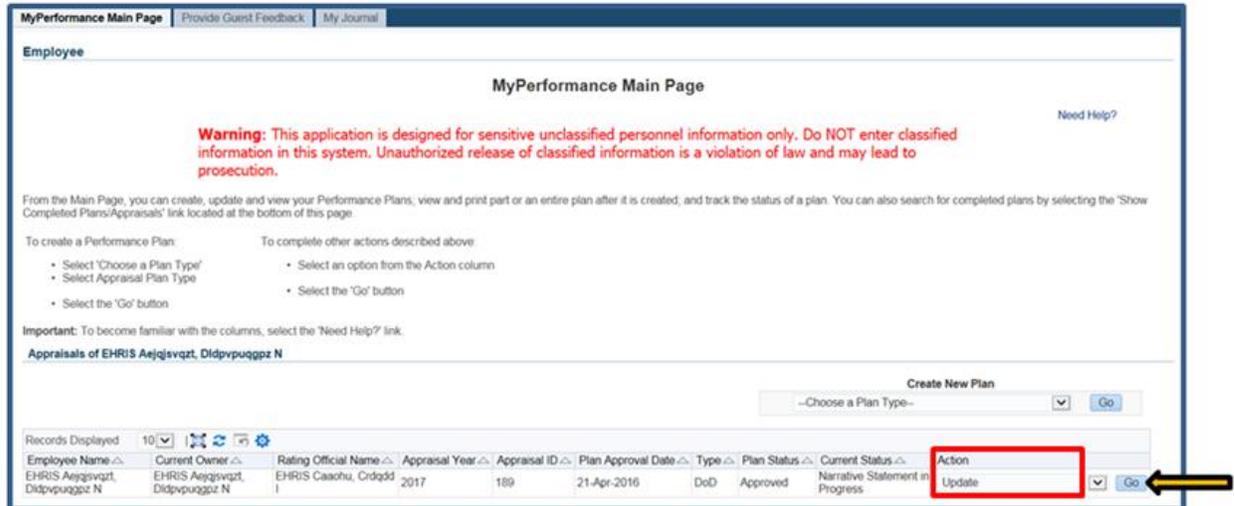
Figure 22 - *MyPerformance Main Page>Update Narrative Statement in Progress*

2. The *Plan Details* page is displayed as pictured below in Figure 23. Select *Narrative Statements* tab to acknowledge receipt of your narrative statement.
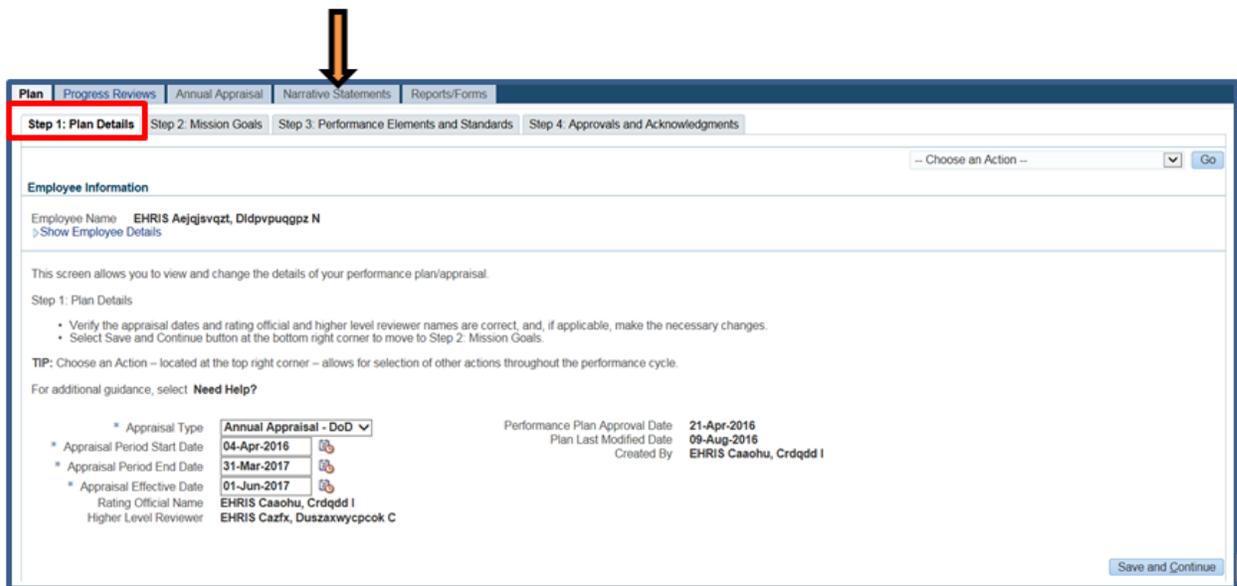
Figure 23 – *Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab*

3. The *Narrative Statements* page is displayed as pictured in Figure 24. Select the **Update**

button under the **Action** column.
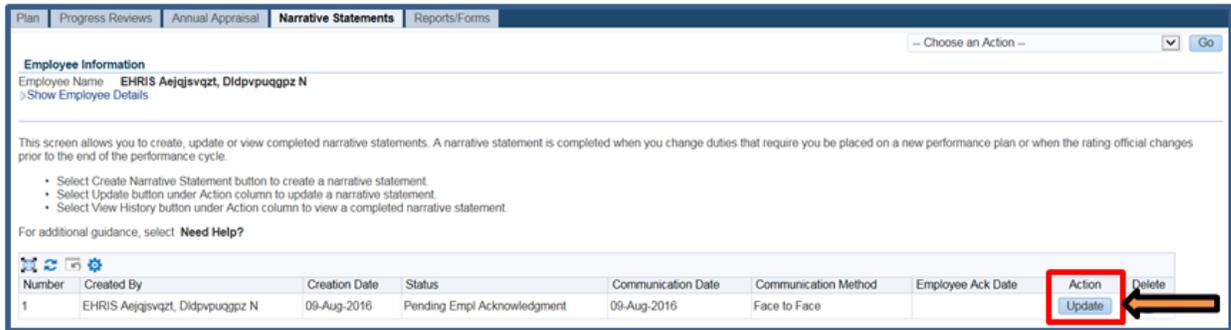
Figure 24 – *Narrative Statements>Update Narrative Statements*

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.

Figure 25 – *Create/Update Narrative Statement>Communication and Acknowledgments>Acknowledge Receipt*

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*

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*

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.
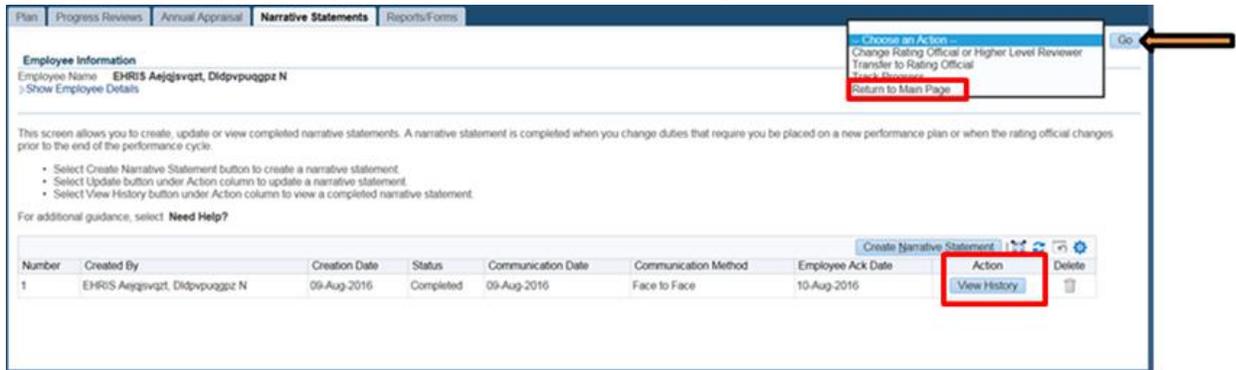
Figure 28 - Narrative Statements - View History and Choose Action>Return to Main Page

9. At the *MyPerformance Main Page*, the Current Status reflects Narrative Statement Completed. Employee still has ownership of the performance plan/appraisal.
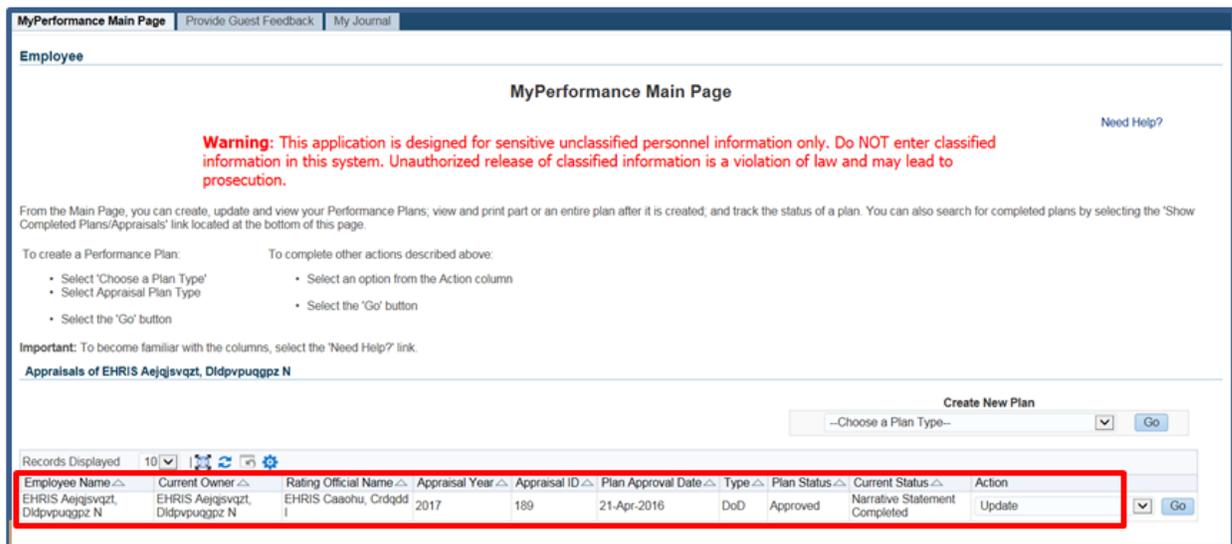
Figure 29 - MyPerformance Main Page>Narrative Statement Completed