DoD Performance Management and Appraisal Program

Human Resources Office
(503) 584-3975

MyPerformance
Action Guide for the
Rating Official

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Create an Employee's Performance Plan

1. Begin at the **MyPerformance Main Page**.

2. Create a new Performance Plan by selecting **'DoD Performance Management Appraisal Program'** from the **'Choose a Plan Type'** drop down menu, then selecting the **'Go'** button, which will display a list of employee's to choose from.

3. Select the **'Create'** button for the employee you would like to create a performance plan. *(If you do not see an individual listed that should fall under your hierarchy, contact Human Resources at 503-584-3975)*

4. Read your role and responsibilities and select the **'Acknowledge'** button.

5. Select the **'Build New Plan'** button or **'Copy an Existing Plan'**.

6. Select the **'Next'** button to continue the process or select the **'Logout'** link to end your session.

Copy an Existing Plan

1. Begin at the **MyPerformance Main Page**.

2. Create a new Performance Plan by selecting **'DoD Performance Management Appraisal Program'** from the **'Choose a Plan Type'** drop down menu, then selecting the **'Go'** button, which will display the **Plan Details Tab Page**.

3. Review the information and make any necessary changes to the default values.

4. Select the **'Copy an Existing Plan'**.

5. Enter the employee name that you would like to copy the plan from and select the **'Find'** button.

6. Select the **'Copy'** button for the plan you would like to copy.

Update Setup Details

1. If the information is not correct:

   - Select the **'Calendar'** icon next to the date to change it. Select a new date.

   - Select the **'Change Rating Official or Higher Level Reviewer'** button to change the Rating Official or the Higher Level Reviewer.

2. Select the **'Next'** button to continue with the process or select the **'Logout'** link to end your session.

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, but can be changed as necessary

Add Mission Goals to Plan

1. Select the **Mission Goals Tab**.

2. Enter your organization's goals so they align with your employee's performance elements and standards

3. Select the **'Save and Continue'** button. If you want to go back to *Step 1: Plan Details*, select the **'Save and Go Back'** button.

Add Performance Element to Plan

Note: Must have a minimum of one critical performance element; Ten is the maximum number of performance elements in any Performance Plan. The average is Five.

Note: *SUPERVISORY DUTIES -* All performance elements related to supervisory duties are critical performance elements. All supervisors must have at least one element relating to their supervisor responsibilities.

Examples of supervisory performance elements have been provided for you in the table below:

Ex: Performance Element Title	Ex: Supervisory Performance Element Description
Supervisory-Communication	Clearly communicate performance plan and hold employee(s) responsible for accomplishing their critical elements and performance standards.
Supervisory-Performance Distinctions	Make clear distinctions among employees based on performance and the employee's contributions aligned with the strategic goals and objectives.
Supervisory-Rewarding Performance	Foster and reward excellent employee performance.
Supervisory-Discipline	Address poor performance timely and professionally IAW policy.
Supervisory-Rate Performance	Ensure employees are assigned a performance rating of record as required by regulation.
Supervisory-Compliance	Adhere to law and regulations concerning merit system principles and prohibited personnel practices. Ensure continuing application of, and compliance with EEO laws, regulations and policy.

1. Select the **Performance Elements and Standards Tab** to review the employee'.

2. Select the **'Add Performance Element'** button to create a new performance element.

3. Enter the Performance Element Title.

This table below provides a description for each of the performance elements and standards fields. You will need to fill in the following 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 *Create Performance Plan* 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	This field defaults to Critical
*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 1,000. An employee can have no more than 10 performance elements.

This table below provides direction based on the scenario indicated. Take the appropriate action based on the 'If You…' scenario, using one of the following options:

If You….	Then…..
Want to cancel the work that has been created so far	Select the **Go Back to Performance Elements** button [Go Back to Performance Elements] You will receive a warning message asking if you want to save the changes. Select **No** button.
Want to save performance element with all required fields entered and add another performance element	Select **Save and Add Another Performance Element** button
Want to save the work periodically on the same page	Select **Save** button
Finished adding performance elements and want to return to the *Performance Elements and Standards* tab	Select **Save** button and then select the **Go Back to Performance Elements** button [Save] [Go Back to Performance Elements]

4. Change the Start Date if the default value is incorrect.

5. Enter your draft Performance Element text.

6. Select one of the following buttons based on the decision table below.

This table below provides direction based on the scenario indicated. Take the appropriate action based on the 'If You…' scenario, using one of the following options:

If You….	Then…..
Want to cancel the work that has been created so far	Select the **Go Back to Performance Elements** button Go Back to Performance Elements You will receive a warning message asking if you want to save the changes. Select **No** button.
Want to save performance element with all required fields entered and add another performance element	Select **Save and Add Another Performance Element** button
Want to save the work periodically on the same page	Select **Save** button
Finished adding performance elements and want to return to the *Performance Elements and Standards* tab	Select **Save** button and then select the **Go Back to Performance Elements** button Save Go Back to Performance Elements

7. Select the **'Save'** button and then the **'Go Back to Performance Elements'** button when you have completed entering the performance elements.

Approve and Acknowledge

A. Begin at the **MyPerformance Main Page**.

B. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

   Note: The status is **'Plan in Progress'.**

C. Read and **'Acknowledge'** your role and responsibilities.

D. Review employee's mission goals by selecting the **Mission Goals Tab**.

E. Select the **Performance Elements and Standards Tab** to list and review the employee's performance element.

F. Select the **Approvals and Acknowledgments Tab**.

The below table provides the steps to be taken for obtaining approval of the performance plan.

Step Number	Performer	Approval Step	Status	Description
1	Rating Official (RO)	Request or Document Higher Level Review*	Not Started	
			Completed	RO has requested HLR review or documented that HLR review has occurred*
2*	Higher Level Reviewer (HLR), as appropriate	Review	Not Started	
			Completed	HLR has approved the plan
3	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
4	Employee or Rating Official	Document Employee Acknowledgment	Not Started	
			Completed	Employee acknowledged receipt or RO has entered communication method and date

G. In **'Step 1: Rating Official - Request or Document Higher Level Review'** select the **'Start'** button.

   Option A: Select Option A if the higher level reviewer needs to review and approve the performance plan.
   - Change the name of the higher level reviewer, if necessary.
   - Select **Transfer to Higher Level Reviewer with** or **without email notification**. (If there is no email address for the higher level reviewer, you will only have the option to transfer without email notification.)
   - Enter a notification message to the higher level reviewer and select **Transfer to Higher Level Reviewer with E-mail Notification**.

   Option B: Select Option B if you have consent by the Higher Level Reviewer to document their review has taken place.

   Note: Option B completes Step 2 and allows the RO to remain the owner of the plan to immediately proceed to Step 3 in the approvals process.

H. If Option B was selected: The next step would be to document communication to employee, select the **Start** button to the right of the task titled: *Step 3: Rating Official - Document Communication to Employee Start button*

I. Enter **Communication Date**, **Communication Method** and **Other**, if necessary, of which plan information was communicated to the employee.

J. Choose either **'Save and Transfer to Employee for Acknowledgment'** or **'Save and go to Step 4'**.
- **Save and Transfer to Employee for Acknowledgment:** Ownership of plan is given to employee. Employee must sign into system and digitally acknowledge receipt. Step 4 is thus completed automatically.
- **Save and go to Step 4:** Ownership of plan is retained by RO. RO must manually complete Step 4 by inputting the date and method employee acknowledged receipt.

K. Employee will need to acknowledge receipt of their plan depending on the RO's action performed in 10, above.

Update Performance Elements in Plan

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

3. Select the **'Plan Tab'** to list the employee's Performance Plans.

4. Select the **'Update'** button in the **'Action'** column for the selected Performance Plan.

5. Select the **Performance Elements and Standards Tab** to list the employee's performance element.

6. Select the **'Update'** button for the Performance Element you want to update.

7. Update any of the Performance Element information.

8. Select the **'Save and Continue'** button.

Add Performance Elements to Plan

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

3. Select the **'Plan Tab'** to list the employee's Performance Plans.

4. Select the **'Update'** button in the **'Action'** column for the selected Performance Plan.

5. Select the **Performance Elements and Standards Tab** to list the employee's performance element.

6. Select the **'Add Performance Element'** button.

7. Input the Performance Element information.

8. Select the **'Save'** and then select the **'Go Back to Performance Elements'** button.

Delete a Performance Element from Plan

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

3. Select the **'Plan Tab'** to list the employee's Performance Plans.

4. Select the **'Update'** button in the **'Action'** column for the selected Performance Plan.

5. Select the '**Performance Elements and Standards Tab'**.

6. Select the **trash can** icon for the Performance Element you want to delete.

7. Select the **'Save and Continue'** button.

Re-Approve Performance Elements for Plan

Whenever performance elements in a plan are modified through the update, delete or add functions, the plan must go through the approval process again.

1. If you are not already in the modified plan, ensure you are the **plan owner** and then access the plan through the **'Action'** area by selecting **'Update'** from the drop down followed by the **'Go'** button from the **MyPerformance Main Page**.

2. Select the **Re-Approval of Performance Elements Tab**.

3. Initiate **Step 1** and refer to the **Approve and Acknowledge** section of this guide to help you complete all steps in the re-approval process.

4. If Step 1 is required by your state, in **'Step 1: RO - Request or Document HLR'** select the **'Start'** button.

5. To Request Higher Level Review, choose Option A.

   • Change the name of the Higher Level Reviewer, if necessary.

   • Enter a notification message to the Higher Level Reviewer.

   • Select the **'Transfer to HLR with E-mail notification'** button or select **'Transfer to HLR without E-mail notification'** button**.**

6. To Document Higher Level Review, choose Option B.

   • Enter the Review Date.

   • Enter the Method of Review. If the Method is **'Other'** complete the **'Other'** text field.

   • Change the name of the Approver (the Higher Level Reviewer).

   • Select the **'Save'** button.

7. If Step 1 is not required by your state, select the **'Start'** button in **'Step 3: Rating Official Document Communication to Employee'.**

   • Enter the date the communication to the employee occurred in the **'Communication Date'** field.

   • Select the Communication Method from the **'Communication Method'** drop down menu. If the Method is **'Other'** complete the **'Other'** text field.

   • Select the **'Save and Transfer to Employee for Acknowledgment'** button.

8. Select the **'Next'** button to continue with the process or select the **'Logout'** link to end your session.

Request or Document Higher Level Reviewer (HLR) Approval of Plan

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

   Note: The status is **'Plan in Progress'**.

3. Select the **Plan Tab** to list the employee's Performance Plan.

4. Select the **'Update'** button in the **'Action'** column for the selected Performance Plan.

5. Select the **Approvals and Acknowledgments Tab**.

6. Select the **'Start'** button in *'Step 1: Rating Official - Request or Document Higher Level Review (Optional)'*

7. To Request Higher Level Review, choose Option A.

    •   Change the name of the Higher Level Reviewer, if necessary.

    •   Enter a notification message to the Higher Level Reviewer.

    •   Select the **'Transfer to HLR with E-mail notification'** button or Select **'Transfer to HLR without E-mail notification'** button.

8. To Document Higher Level Review, choose Option B.

    •   Enter the Review Date.

    •   Enter the Method of Review. If the Method is **'Other'** complete the **'Other'** text field.

    •   Change the name of the Approver (the Higher Level Reviewer).

    •   Select the **'Save'** button.

9. Select the **'Next'** button to continue with the process or select the **'Logout'** link to end your session.

Document Communication of the Performance Plan to the Employee after HLR Approval

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

    Note: The status is **'Plan Approved by HLR'.**

3. Select the **'Update'** button in the **'Action'** column for the selected Performance Plan.

4. Select the **Approvals and Acknowledgments Tab**.

5. Select the **'Start'** button in **'Step 3: Rating Official - Document Communication to the Employee.'**

6. Enter the date the communication to the employee occurred in the **'Communication Date'** field.

7. Select the Communication Method from the **'Communication Method'** drop down menu. If the Method is **'Other'** complete the **'Other'** text field.

8. Select the **'Transfer to Employee'** button.

9. Select the **'Return to Main Page'** button to start a new process or select the

   'Logout' link to end your session.

Retrieve a Performance Plan or Appraisal

1. Begin at the **MyPerformance Main Page**.

2. Select **'Retrieve'** from the **'Action'** drop down menu for the plan listed and select the **'Go'** button.

Change the Rating Official and Higher Level Reviewer

1. Begin at the **MyPerformance Main Page**.

2. Select **'Change RO and/or HLR'** from the **'Action'** drop down menu for the plan listed and select the **'Go'** button.

3. Change the Rating Official Name or the Higher Level Reviewer using the **'Flashlight'** icon.

4. Select the **'Return to Main Page'** button to continue with the process or select the **'Logout'** link to end your session.

Transfer Plan to the Employee

1. Begin at the **MyPerformance Main Page**.

2. Select **'Transfer to Employee'** from the **'Action'** drop down menu for the plan listed and select the **'Go'** button.

3. Type an e-mail message to the employee indicating that you are transferring the Performance Plan.

4. Select the **'Transfer to Employee'** button at the top of the E-Mail Notification Page.

Document Employee Acknowledgment of Plan

1. Begin at the **MyPerformance Main Page.**

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

   Note: The status is **'Plan Approved'**.

3. Select the **Approvals and Acknowledgments Tab**.

4. Select the **'Start'** button in **'Step 4: Rating Official - Document Employee**

   Acknowledgment. '

5. Select the **'Return to Main Page'** button to start a new process or select the **'Logout'** link to end your session.

Create a Progress Review

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

    Note: The status is **'Plan Approved'.**

3. Read and **Acknowledge** your role and responsibilities.

4. Select the **Progress Reviews Tab**.

5. Select the **'Create Progress Review'** button.

Assess an Employee's Performance Elements During Progress Review

1. From the **Progress Review Tab**

2. Select the **Assessments Tab** to list the employee's performance elements and assessments.

3. Select the radio button next to each performance elements to display that element and the employee's self-assessment, if available.

4. Enter your evaluation for each performance element.

5. Proceed to **'Transfer Progress Review to Employee for Employee Self-Assessment'** area in this guide book, if you did not choose to perform this step first.

    Note: You may request for the employee to provide their self-assessment prior to inputting your assessment (see below).

Transfer Progress Review to Employee for Employee Self Assessment

1. Select **'Transfer to Employee'** from the **MAIN PAGE** in the **'Action'** drop down menu.

    Note: If you are already in the employee's performance record, top tab **'Progress Review**, lower tab **'Assessments'**. You can also transfer the review to the employee by selecting the **'Transfer to Employee'** button at the top of the screen.

2. In the text box, type a message the employee that they should update their appraisal in the system by inputing their **'Employee Self Assessment'** under the **'Progress Review'**, **'Assessments'** tabs.

   Note: You will wait for the employee to complete the self assessment and return the review to you. If they are unable or refuse to do so, you can retrieve the review and advance to the next step of approvals and acknowledgments.

Document Communication of the Progress Review

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

1. Select the **Progress Reviews Tab**.

2. Select the **'Update'** button for the selected Progress Review.

3. Select the **Approvals and Acknowledgments Tab.**

4. Select the **'Start'** button in **'Step 1: Rating Official - Document Communication to the Higher Level Reviewer.'**

5. Proceed with approval process, referring to the section, **Approve and Acknowledge,** for guidance to help you accomplish all steps in the Progress Reviews approvals process.

Rate an Employee's Performance Elements During Annual Appraisal

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down and select the **'Go'** button.

    Note: The status will be **'Progress Review Completed'.**

3. Select the **Annual Appraisal tab** to list the employee's Job Objectives.

4. Select the radio button next to each performance element to display the element and the employee's self-assessment.

5. Enter your evaluation by creating a narrative statement. *(REQUIRED)*

    Note: A narrative statement is a brief narrative description of an employee's performance, accomplishments and contributions during the current appraisal period. Narratives are generally created at the close of the appraisal cycle yet may be created when that the rating official or employee changes job. A narrative statement is not a rating of record. A narrative statement is required.

6. Recommend a performance level rating.

Level	Description
Level 1	**"Unacceptable"** Any *critical* performance element rated as a '1'. Consideration of non-critical elements *shall not* result in assigning a '1'. *Requires employee to be placed on a Performance Improvement Plan (PIP). *Must contact Labor Relations Specialist in Human Resources. *Examples:* Doesn't meet expectations for quality of work; fails to meet many of the req'd results for the goal. Is unreliable; makes poor decisions; misses targeted metrics (e.g. commitments, deadlines, quality). Lacks or fails to use skills required for the job. Requires more supervision than expected for an employee at this level.
Level 3	**"Fully Successful"** The average score of all critical element performance ratings is less than 4.3, with no critical element being rated a '1' (Unacceptable), resulting in a rating of record that is a '3'. *Examples:* Effectively produces the specified outcomes, and sometimes exceeds them. Consistently achieves targeted metrics. Proactively informs supervisor of potential issues or roadblocks and offers suggestions to address or prevent them. Achieves goals with appropriate level of supervision.
Level 5	**"Outstanding"** The average score of all critical element performance ratings is 4.3 or greater, with no critical elements being rated a '1' (Unacceptable), resulting in a rating of record that is a '5'. *Examples:* Produces exceptional results or exceeds expectations well beyond specified outcomes. Sets targeted metrics high and far exceeds them (e.g., quality, budget, quantity) Handles roadblocks or issues exceptionally well and makes a long-term difference in doing so. Is widely seen as an expert, valued role model, or mentor for this work.
Not Rated	If an employee doesn't have an opportunity to perform work associated with a performance element for 90 calendar days during the appraisal cycle, no performance element rating will be assigned for that performance element. An unratable performance element cannot be used as a factor in deriving a rating of record.

7. Click, **'Save and Return to Top of Page'**

8. Repeat steps 4 through 6 until all performance elements are evaluated and rated.

   Note: The employee will need to add their wording to the '**Employee Self Assessment'** block. Find instructions on how to, transfer rated appraisal to employee, in the next section of this guide.

Transfer Rated Appraisal to Employee for Employee Self Assessment

1. After rating an employee's performance elements and adding written assessment, select **'Transfer to Employee'**

   Note: You will be in the employee's appraisal, top tab **'Annual Appraisal'**, lower tab **'Assessments and Ratings'**. However, you can transfer the appraisal to the employee from the Main Page as well, under the '**Action'** drop down.

2. In the text box, type a message the employee that they should update their appraisal in the system by inputting their **'Employee Self Assessment'** under the **'Annual Appraisal'**, **'Assessments and Ratings'** tabs.

   Note: You will wait for the employee to complete the self assessment and return the appraisal to you. If they are unable or refuse to do so, you can retrieve the appraisal and advance to the next step of approvals and acknowledgments.

Complete Approvals & Acknowledgments for Annual Appraisal

1. Begin at the **MyPerformance Main Page**.

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down and select the **'Go'** button.

   Note: The status will be **'Progress Review Completed'.**

3. Select the **'Annual Appraisal'** tab

4. Select the **'Approvals & Acknowledgments'** tab

   Note: The RO must ensure the first _three steps_ are followed. Until then, the record will not be considered by HRO nor the system of record as completed.

5. In **'Step 1: Rating Official - Request or Document Higher Level Review'** select the **'Start'** button.

Option A: Select Option A if the higher level reviewer needs to review and approve the performance plan.

- Change the name of the higher level reviewer, if necessary.
- Select **Transfer to Higher Level Reviewer with** or **without email notification**. (If there is no email address for the higher level reviewer, you will only have the option to transfer without email notification.)
- Enter a notification message to the higher level reviewer and select **Transfer to Higher Level   Reviewer with E-mail Notification**.

Option B: Select Option B if you have consent by the Higher Level Reviewer to document their review has taken place.

Note: Option B completes Step 2 and allows the RO to remain the owner of the plan to immediately proceed to Step 3 in the approvals process.

6. If Option B was selected: The next step would be to document communication to employee, select the **Start** button to the right of the task titled: *Step 3: Rating Official - Document Communication to Employee Start button*

7. Enter **Communication Date**, **Communication Method** and **Other**, if necessary, of which plan information was communicated to the employee.

8. A confirmation message indicating that once you exit the appraisal, it will be removed from your **'Plans/Appraisals in Progress'** area and will be placed under the **'Completed Plans/Appraisals'** found on the MyPerformance Main Page.

Note: The completed appraisal will be archived and thus removed from your Main Page as a single line item. If you still see an appraisal on your Main Page that you believe was completed – contact Human Resources for assistance – this means something was not done correctly and it may result in your name showing up on a delinquent supervisor's list.

NARRATIVE STATEMENT – When Employee or Supervisor Changes

Narrative Statements

A Narrative Statement needs to be completed when an employee or supervisor changes sections within an appraisal cycle. This enables the existing plan for the appraisal cycle to stay with the employee, alleviating additional work for all involved. **1 Cycle : 1 Employee : 1 Plan**

1. Begin at the **MyPerformance Main Page.**

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'**

drop down menu and select the **'Go'** button.

> **Note**: The status is **'Plan Approved'**.

3. Select the **Narrative Statements Tab**.

4. Select the **'Create Narrative Statement** button.

5. Select **'Yes'** to proceed with creation of the narrative statement.

6. Select the **'Assessments'** tab.

7. Select the radio button next to the performance element and standards you want to enter your performance narrative.

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 input	Select Go Back to Top of the Page button Go Back to Top of Page

8. Once created and/or entered narrative, you can transfer to the employee for their input against each performance elements and standards.

9. Select, **'Go Back to Narrative Statements'** button to return to the Narrative Statements Tab.

10. The initiated narrative statement is now displayed in the table. At this point, you can update or delete the narrative statement.

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

11. To transfer your performance plan/appraisal to the employee, first select '**Choose an Action'** LOV drop down arrow depicted in the red box below. Second, select '**Transfer to Employee'**. Lastly select the '**Go'** button to the right.

12. You have the option to transfer to the employee with or without e-mail notification. If you chose to enter comments in the **Message to Employee** area, your message will show up in the e-mail. Select the **Transfer to Employee without E-mail Notification** or **Transfer to Employee with E-mail Notification** button to transfer the performance plan to the employee.

13. You will be returned to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the employee. The performance plan/appraisal is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page*.

    Note: You no longer have ownership and can only view the performance plan/appraisal. However, at any time, you have the option to retrieve the plan from the employee.

14. The employee retains ownership and should reassign the gaining supervisor as their Rating Official on the current plan in progress so the gaining supervisor can access the plan to proceed with managing their performance.

Retrieve a Plan/Appraisal After a Transfer has Occurred

Note: This action may be required if:

- Higher Level Reviewer acknowledged by other means and is not able to transfer the plan/appraisal through the system.

- Employee refused the plan/appraisal.

- Employee unable to access the system to transfer the plan/appraisal back.

1. Begin at the **MyPerformance Main Page.**

2. Open an employee's existing Performance Plan by selecting **'Update'** from the **'Action'** drop down menu and select the **'Go'** button.

Track Progress of Plans/Appraisals in Progress

1. Begin at the **MyPerformance Main Page**

2. Open an employee's existing Performance Plan by selecting **'Track Progress'** from the **'Action'** drop down menu and select the 'Go' button.

3. A screen providing information regarding the status of the performance plan throughout the performance cycle will be displayed. When you are done reviewing the status of the plan/appraisal, select the **'Return to Previous'** button to resume your activity.

Apply Actions to Multiple Employees

Note: Rating Officials and Higher Level Reviewers can perform system actions on multiple employees at one time with this responsibility. Types of actions that can be performed on multiple employees are:

- **Change higher Level Reviewer**
- **Change Rating Official**
- **Copy One Active Plan to Multiple Employees**
- **Document Communication of the Plan** (must be the current owner)
- **Document Communication of the Progress Review** (must be the current owner)
- **Document Employee Acknowledgment of the Final Rating** (must be the current owner)
- **Request or Document Higher Level Review of the Plan** (must be the current owner)
- **Request or Document Higher Lvl Review of Progress Review** (must be the current owner)
- **Retrieve Plan/Appraisal from Employee**
- **Retrieve Plan/Appraisal from Higher Level Reviewer**
- **Transfer to Employee** (must be the current owner)
- **View/Print Current Employee Appraisal Info**

1. Begin at the Key Services menu

2. Select **'Apply Action(s) to Multiple Employees'**.

3. Select the appropriate role (Dod - Rating Official, DoD - Higher Level Reviewer).

4. Choose the action you would like to perform from the list.

5. Follow screen prompts, these will vary depending on action being completed.

6. Click on the '**Return to Available Actions'** button when complete.

Assign/Remove a Trusted Agent

Note: A Trusted Agent can only be assigned with prior approval from the Human Resource Officer. Contact Human Resources at, 503-584-3975 to pursue authorization.

Troubleshooting

1. Begin at the **MyPerformance Main Page**

2. **'Track Progress'** first. This will help you determine where you're at in the process.

3. Determine who the owner of the plan/review/appraisal is from the MAIN PAGE under the Plans in Progress lines. This individual will be the one who is able to update the record.

    Note: A common problem is confusing the transfer of a record with the acknowledgement/approval of a record. Transferring only moves the records owner; it does not complete acknowledgment/approval actions.