



Performance Management

DoD Performance Management and Appraisal Program (DPMAP)

***Mr. Randy Hendryx
602-629-4815***



Who can be a supervisor?

Full time employee's in a supervisory position

Technician's either Title 32 or Title 5

AGR's (Title 32)

Federal Active Duty Personnel (Title 10)

Certain State Employee's



Who receives an appraisal?

Permanent Employees - Tenure 1

Indefinite Employees – Tenure 3

***Conditional Employees – Tenure 2
(AFTER the 1 year probation/trial period)***



Conditional Employees

(Trial-Period Employees)

- **Performance & conduct are monitored to determine suitability for continued technician service**
- **After the trial period (1 year probation) an appraisal will be initiated in DPMAP for the next appraisal cycle.**
- **During the trial period, the technician's appointment can be terminated at any time – *record and maintain documentation of employee conduct!***



Conditional Employees

(Trial-Period Employees)

- **RETAIN** - The technician's work performance must minimally rate at the Fully Successful, a Level 3 rating
- **NOT TO RETAIN** - Supporting documentation will be forwarded to the HRO who will advise supervisors and managers on appropriate action(s) to remove the technician from Federal service
 - The trial-period appraisal is NOT covered by 5 CFR 432 or TPR 752 (Discipline and adverse actions)--accordingly, there are no appeal rights



Who DOES NOT receive an appraisal?

Temporary Employees – Tenure 0



- **Yearly Appraisal cycle**
 - **Start date - April 1st**
 - **End date - March 31st**
 - **Effective date - June 1st**

- **Employee's must be supervised (on an approved plan) at least 90 days within the April to March cycle in order to receive an appraisal**



**Three formal documented discussions are required in DPMAP
(DoDI and CNGBI - 1400.25 v431)**

- **Performance Plan**
- **Progress Review**
- **Final Appraisal**



- **DPMAP is a 3-tiered rating system**
 - **Level 5 – Outstanding**
 - **Level 3 - Fully Successful**
 - **Level 1 –Unacceptable**
- **All Performance Elements are critical and will not be weighted.**



DPMAP uses a summary rating and a rating of record

- **Summary rating** – the sum total of all performance elements divided by the number of elements
- **Rating of record** – over all rating of the appraisal using the chart below

| Summary Rating | Rating of Record | Appraisal Level |
|----------------|------------------|------------------|
| 4.3 – 5.0 | 5 | Outstanding |
| 3.0 – 4.2 | 3 | Fully Successful |
| 2.9 or lower | 1 | Unacceptable |



| PART E - PERFORMANCE RATING SUMMARY <i>(Completed by Rating Official/Supervisor - copy Part D blocks 2, 3, and 8.)</i> | | | | | | | | | | | | | | | | | | |
|---|---|--|---|---------------|------------------|-------------------------------|-----------|-------------|---|---|-----------|------------------|---|---|--------------|--------------|---|--|
| a. ELEMENT NUMBER | b. ELEMENT TITLE | c. ELEMENT RATING <i>(5, 3, or 1) (X box if Not Rated)</i> | | | | | | | | | | | | | | | | |
| 1 | Widget Distribution Operations | 3 - Fully Successful <input type="checkbox"/> NR | | | | | | | | | | | | | | | | |
| 2 | Widget Storage Operations | 3 - Fully Successful <input type="checkbox"/> NR | | | | | | | | | | | | | | | | |
| 3 | Widget Quality Control Testing/Analysis | 5 - Outstanding <input type="checkbox"/> NR | | | | | | | | | | | | | | | | |
| 4 | DLA Accounting and FISC | 3 - Fully Successful <input type="checkbox"/> NR | | | | | | | | | | | | | | | | |
| 5 | Additional Duties | 3 - Fully Successful <input type="checkbox"/> NR | | | | | | | | | | | | | | | | |
| SUMMARY RATING: Obtain by adding the values in the Performance Element Rating column and dividing by the number of rated elements (round to the nearest tenth). Enter result in block A1. | | A1 3.4 | | | | | | | | | | | | | | | | |
| RATING OF RECORD: Obtain by using the Summary Rating against the chart below to determine Summary Level. | | A2 3 – Fully Successful | | | | | | | | | | | | | | | | |
| <p>SUMMARY LEVEL CHART</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Range</th> <th style="width: 15%;">Summary Level</th> <th style="width: 15%;">Rating of Record</th> <th style="width: 55%;">Summary Level Rating Criteria</th> </tr> </thead> <tbody> <tr> <td>4.3 - 5.0</td> <td>Outstanding</td> <td style="text-align: center;">5</td> <td>The summary rating of all element ratings of 4.3 or greater results in a rating of record of "5" - Outstanding, with no element rated "1" - Unacceptable.</td> </tr> <tr> <td>3.0 - 4.2</td> <td>Fully Successful</td> <td style="text-align: center;">3</td> <td>The summary rating of all element ratings of between 4.2 and 3.0 results in a rating of record of "3" - Fully Successful, with no element rated "1" - Unacceptable.</td> </tr> <tr> <td>2.9 or lower</td> <td>Unacceptable</td> <td style="text-align: center;">1</td> <td>Any element rated as "1" - Unacceptable.</td> </tr> </tbody> </table> <p>When a rating on any element is "1" - Unacceptable, the overall Rating of Record shall be "1" - Unacceptable, regardless of the Summary Rating.</p> | | | Range | Summary Level | Rating of Record | Summary Level Rating Criteria | 4.3 - 5.0 | Outstanding | 5 | The summary rating of all element ratings of 4.3 or greater results in a rating of record of "5" - Outstanding, with no element rated "1" - Unacceptable. | 3.0 - 4.2 | Fully Successful | 3 | The summary rating of all element ratings of between 4.2 and 3.0 results in a rating of record of "3" - Fully Successful, with no element rated "1" - Unacceptable. | 2.9 or lower | Unacceptable | 1 | Any element rated as "1" - Unacceptable. |
| Range | Summary Level | Rating of Record | Summary Level Rating Criteria | | | | | | | | | | | | | | | |
| 4.3 - 5.0 | Outstanding | 5 | The summary rating of all element ratings of 4.3 or greater results in a rating of record of "5" - Outstanding, with no element rated "1" - Unacceptable. | | | | | | | | | | | | | | | |
| 3.0 - 4.2 | Fully Successful | 3 | The summary rating of all element ratings of between 4.2 and 3.0 results in a rating of record of "3" - Fully Successful, with no element rated "1" - Unacceptable. | | | | | | | | | | | | | | | |
| 2.9 or lower | Unacceptable | 1 | Any element rated as "1" - Unacceptable. | | | | | | | | | | | | | | | |



- **Performance Elements**
 - **Minimum of 3**
 - **Maximum of 10**
- **Performance Narratives.** Supervisors will write a performance narrative that addresses the employee's performance measured against the performance standards for the appraisal cycle.
- **Performance narratives are mandatory for each element rated "Outstanding" (Level 5) and "Unacceptable" (Level 1). Performance narratives are optional but highly encouraged for each element rated "Fully Successful" (Level 3)**
- **Performance Narrative Statements are required when a supervisor changes for an employee who has performed under an approved performance plan for 90 calendar days (Closeout assessment) .**



- Performance elements and standards for supervisors must be equal to or greater than the technical elements and standards

NEW—Mandatory Element for Supervisors

- Supervisors must have the following element on whistleblower protection

It must be copied verbatim

Supports the Whistleblower Protection Program by responding constructively to employees who make protected disclosures under 5 U.S.C. 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.



- DoD core values will be annotated on ALL performance plans.
 - Leadership
 - Professionalism
 - Technical knowledge through dedication to duty,
 - Integrity
 - Ethics
 - Honor
 - Courage
 - Loyalty

- Organizational values can be incorporated to include organizational mission statements or goals which apply to the employee's performance elements

- Performance plans must be Approved within 30 Days of the start date of the rating period

| Plan | |
|------|---|
| | Drafted |
| | Reviewed by Higher Level Reviewer |
| | Approved |
| | Communicated to Employee by Rating Official |
| | Acknowledged by Employee |



Performance management process:

- **Planning** work and setting expectations
(Writing the elements and plan)
- **Monitoring** performance
(Providing feedback/discussions in DPMAP)
- **Evaluating** performance in a summary fashion
(End of cycle evaluation/appraisal)
- **Recognizing and rewarding** good performance
(SSP's, Time off awards, letter of recognition)



Planning Process

- Analyze the position
- Assess what the key KSAs are
- Review/update the job standards
- Review/ensure accuracy of the position description
- Identify the job elements



Performance elements describe what work is to be accomplished

Minimum of 3 or a maximum of 10 performance elements allowed

Each element must have associated standards that define expectations

The number of supervisory performance elements will equal or exceed the number of non-supervisory (technical) performance elements

An organization *may* have standardized performance elements

DoD Instruction 1400.25, Vol. 431



Performance Standards

Standards describe how the requirements and expectations provided in the performance elements are to be evaluated

Should be written using SMART criteria

Must be written at “Fully Successful” level for each performance element

Avoid using absolute standards (e.g., 100 percent, always, or never) unless critical to life and safety



Performance Standards

Are the standards fair?

Are they comparable to expectations for other employees in similar positions?

- Applying different standards to employees doing the same work does not appear on its face to be fair or valid
- Requiring higher-level management review of standards for similar work across an organization may be one way of ensuring equity

Do the standards allow for some margin of error?

- Requiring perfection is not fair in most instances



SMART Criteria

S Specific

M Measurable

A Achievable

R Relevant

T Timely



Timely

2. Provide accurate, timely customer service

Upon receipt of requests, provide accurate responses in the agreed-upon timeframes, as defined by ICD 24.8, using the appropriate format identified in SOP25 during the performance appraisal cycle ending March 31, 2017. This supports the organization's commitment to be responsive to customers and clients. Meet suspenses 90% of the time. Provide accurate responses with no more than 2 errors per request.

Specific

Relevant

Measurable/
Achievable



Monitoring Performance

Two-Way Communication

Emphasize Organizational Goals

Frequent Performance Discussions

Focus on Performance

Timely Recognition and Rewards

Early Detection of Performance Issues



Supervisors

- ✓ Continuously communicate; provide encouragement, meaningful feedback, and recognize accomplishments
- ✓ Provide employees an opportunity to highlight their successes relative to the performance elements and standards
- ✓ Identify needed changes to performance elements as appropriate
- ✓ Review IDPs to identify development opportunities
- ✓ Identify employee's skills and abilities, and look for opportunities to further development
- ✓ Document performance discussions
- ✓ Recognize and reward performance throughout the performance appraisal cycle



- First step in addressing performance issues
- Informal feedback may take several forms
- Steps for effective informal feedback are:

- ✓ State what has been observed using facts, not emotions
- ✓ Describe how the performance fails to meet standards
- ✓ Wait for a response (let them talk)
- ✓ Ask for a solution; give suggestions if needed
- ✓ Agree on a solution together
- ✓ Set a follow-up date and time

Make sure you document everything!



Avoiding Year-End Surprises

Continuous performance discussions help ensure clear understanding of outcomes at the final performance appraisal discussion.

The overall goal is mutual understanding between employee and supervisor helps eliminate surprises at the final performance appraisal discussion



Evaluating Performance

A written rating of record must be provided at the end of the appraisal cycle for each employee who has been under an approved performance plan for 90 calendar days during the cycle.



Evaluating Performance

Performance Narratives

Descriptive statement of the employee's performance measured against the performance standards for the appraisal cycle



Evaluating Performance

Performance Narratives

- Justify how an employee's ratings are determined
- Are required for each element rated "Outstanding" and "Unacceptable"
- Are highly encouraged for each element rated "Fully Successful" as a means of recognizing all levels of accomplishments and contributions to mission success



Level 5 - Outstanding

- 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
- Exhibits the highest standards of professionalism

Level 3 – Fully Successful

- 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 1 - Unacceptable

- Does not meet expectations for quality of work; fails to meet many of the required 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 much more supervision than expected for an employee at this level



Mandatory Action Situations

- 1) Appraisal's of less than "Fully Acceptable" requires immediate remedial action to allow improvement, including:
 - Establishment of a written Performance Improvement Plan (PIP)
 - An offer to participate in the Employee Assistance Program (EAP), as needed



1) Continued

- Description of potential actions resulting from continued “unacceptable” performance
- Statement of Notice that performance is at best “Marginally Acceptable”, for pay purposes
- Withholding of Within-Grade increase for which otherwise eligible



2) If performance improves to “Fully Acceptable”, a new appraisal may be given

- An acceptable performance rating requires granting a Within-Grade Increase previously withheld**



3) A continuing “Unacceptable” rating requires the technician be

- Removed from employment in that position
- Reduced in grade (in that position) to a level at which qualified & capable of acceptable performance, OR
- Reassigned to another position for which qualified & capable of acceptable performance



Appraisal Appeals

A Technician may appeal any performance appraisal or notice of rating or any single aspect of an appraisal/rating.

Timeframes for filing appeals:

- **Other than unacceptable ratings – within 30 calendar days of receiving the original copy of the appraisal**
- **Based on Unacceptable ratings – within 15 calendar days of receipt of written notice or original copy of appraisal**



Appraisal Appeals

The Performance Appraisal Review and Appeals Board:

- Established by the state Adjutant General
- Consists of members of equal or higher grade than appellant
- Cannot be in the appellant's chain of command



Appraisal Appeals

The Performance Appraisal Review and Appeals Board:

- **Concerned only with the appeal--
NOT the personnel action taken as a result of an unacceptable appraisal**
- **Submits decision within 15 calendar days**



Appraisal Appeals

- **The appellant is entitled to representation**
- **There are no appeal rights for this purpose beyond the Adjutant General**
- **Labor Relations Specialist – Mr. Tinashe Machona**



References

- **5 CFR 430 (Performance Management)**
- **5 USC 4301-4305 (Performance Appraisal)**
- **DoDI 1400.25 Vol 431 (DoD Civilian Personnel Management System: Performance Management and Appraisal Program)**
- **CNGBI 1400.25 Vol 431 (NG Technician Performance Appraisal Program)**
- **TPR 752 (Adverse and Disciplinary Actions)**



DCPDS PORTAL

News and Info

Last updated January 11, 2016 13:00 CDT

The Department of Defense (DoD) Civilian Personnel Data System (DCPDS) has the honor to offer you the opportunity to represent the U.S. CENTCOM Civilian Personnel Data System (DCPDS) in the Department of Defense (DoD) Civilian Personnel Data System (DCPDS).

The added value for employees participating in a diverse workforce is the difference in the Department of Defense (DoD) Civilian Personnel Data System (DCPDS).

Thank you for all of your contributions and the effort you took to let us know what was working for you and what needs improvement. Throughout the last year, and looking forward, we will continue to value your input to enhance MyBiz+.

Attention CSU Users: The CSU application and database will be decommissioned in the near future. Data has been transitioned to the Current Record Data Mart in CMIS. DLA/DLA customer CSU users will no longer have access to CSU as of June 30, 2016. This notice will be updated with dates for other agencies as they are announced.

Component Help Desk Information

If you are having problems accessing this site, please select [Contact List](#) to locate and directly contact your Component Help Desk.

For additional information, check out our [Frequently Asked Questions \(FAQ\)](#)!



Smart Card A

Click the login button below and select

Smart Card Login

First time Smart Card (CAC) user? [Click here for help.](#)

Returning Non-Smart Card (Non-CAC) user? [Click here for help.](#)

Non-Smart Card Access

First time Non-Smart Card (Non-CAC) user? [Click here for help.](#) Password problems? [Reset](#)

For technical problems, select the [Component](#) support Help Desk.

In Internet Explorer navigate to <https://compo.dcpds.cpms.osd.mil>.
Click on Smart Card Log In
Then select the Email certificate...

...and accept the Privacy Act Statement.

Privacy Act Statement

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

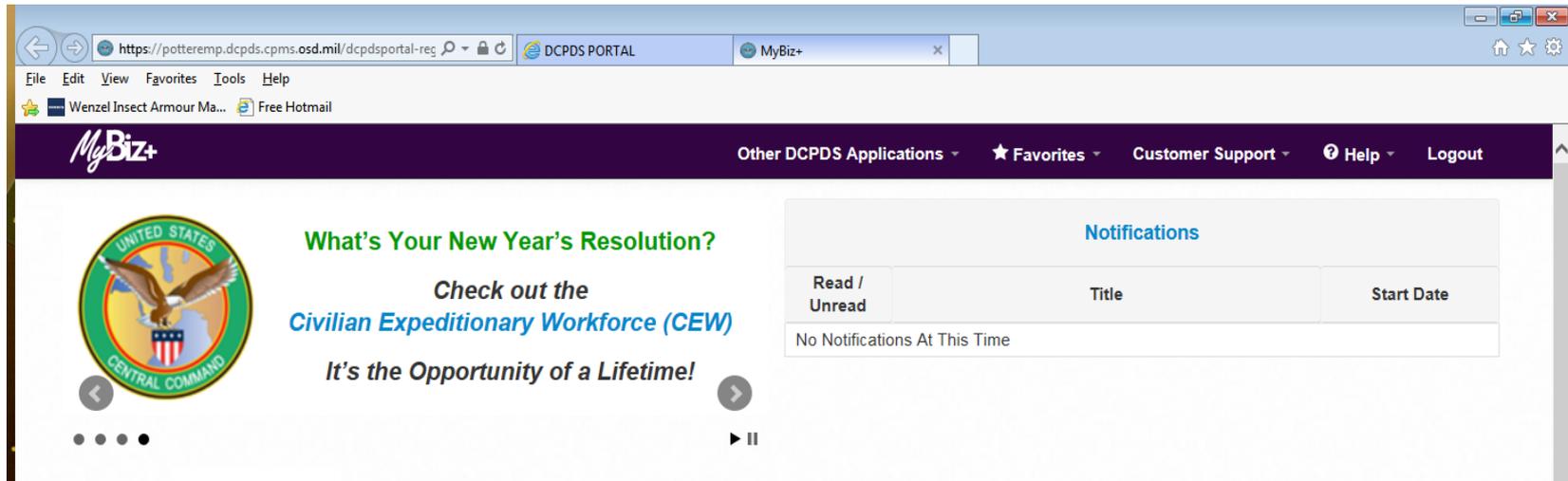
Authorities: 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, volumes 1100 and 1401; 29 CFR 1614.601; and E.O. 9397.

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

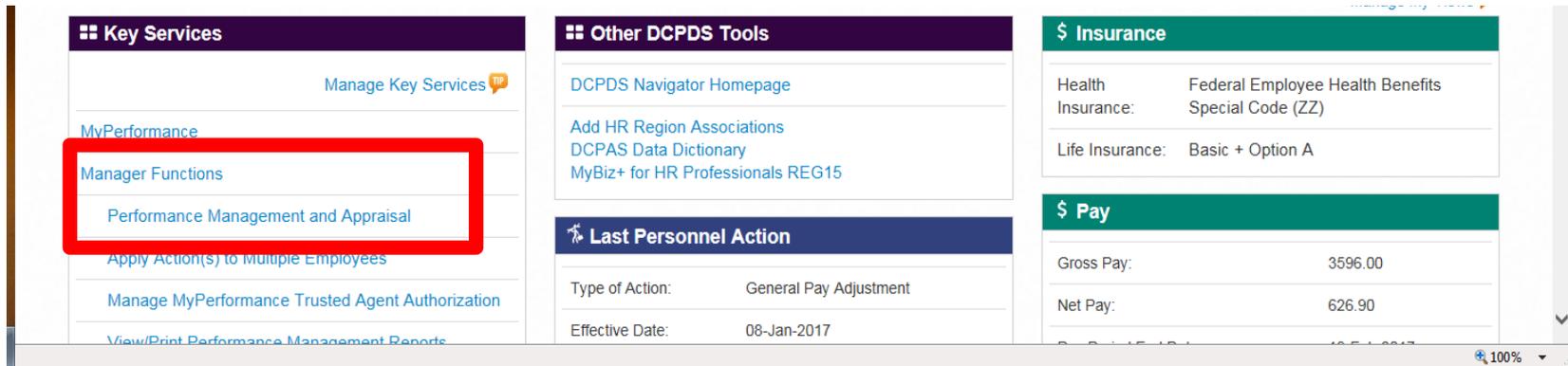
Routine Uses: None. The DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system.

Disclosure: Voluntary. However, failure to provide or update your information may require manual HR processing or the absence of some information.

Accept



To create or modify employee Performance Plans select “Performance Management and Appraisals” under Manager Functions.





The MyPerformance Main Page displays current active performance plans.
 This list is not from the hierarchy.
 Only people in the rating chain have access to employee performance plans.

myperformance main page

[Need Help?](#)

Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan. You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button

To complete other actions described above:

- Select an option from the Action column
- Select the 'Go' button

Important: To become familiar with the columns, select the 'Need Help?' link.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Show Me Appraisal Year

Create New Plan

--Choose a Plan Type--
 DoD Performance Management Appraisal Program
 Defense Civilian Intelligence Personnel System
 National Guard (Title 32)

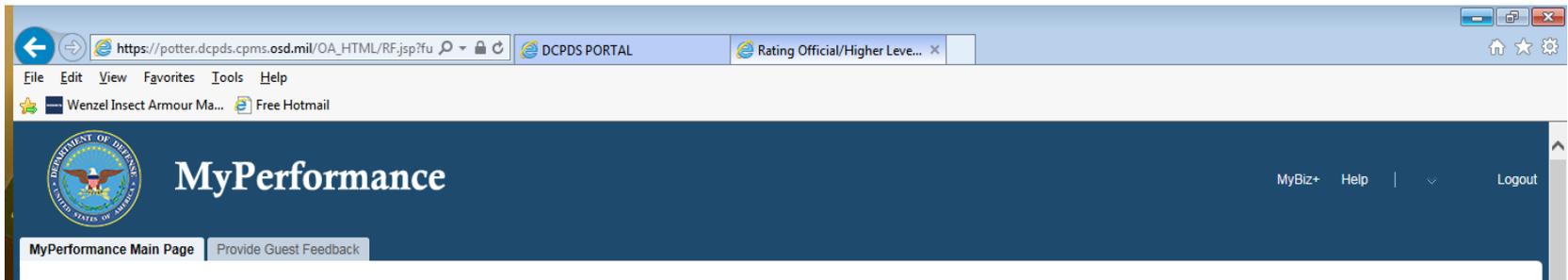
Records Displayed

| Employee Name ^ | Current Owner ^ | Rating Official Name ^ | Appraisal Year ^ | Appraisal ID ^ | Plan Approval Date ^ | Type ^ | Plan Status ^ | Current Status ^ | Action |
|--------------------|------------------|------------------------|------------------|----------------|----------------------|--------|---------------|--------------------------|--|
| WING, ROBIN MARIE | Stout, Tracy Ann | Stout, Tracy Ann | 2017 | 760705 | 22-Jan-2016 | NG | Approved | Interim Review Completed | Update <input type="button" value="Go"/> |
| BEACH, ERICA LEIGH | Stout, Tracy Ann | Stout, Tracy Ann | 2017 | 760462 | 22-Jan-2016 | NG | Approved | Interim Review Completed | Update <input type="button" value="Go"/> |

Select the link to search for Completed Plans.
 > Show Completed Plans/Appraisals

Auto saving in about 14 minute(s)

100%



Select DoD Performance Management and Appraisal Program and click "GO"

Warning: This system. Unautl

From the Main Page, you can create, update and view emp
You can also search for completed plans by selecting the 'S

To create a Performance Plan: To complet

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button

Important: To become familiar with the columns, select the [Plans/Appraisals In Progress](#)

TIP Only Employees that have a plan in progress are li

Show Me Appraisal Year

Records Displayed

| Employee Name | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current Status | Action |
|--------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------------|--|
| WING, ROBIN MARIE | Stout, Tracy Ann | Stout, Tracy Ann | 2017 | 760705 | 22-Jan-2016 | NG | Approved | Interim Review Completed | Update <input type="button" value="Go"/> |
| BEACH, ERICA LEIGH | Stout, Tracy Ann | Stout, Tracy Ann | 2017 | 760462 | 22-Jan-2016 | NG | Approved | Interim Review Completed | Update <input type="button" value="Go"/> |

Select the link to search for Completed Plans.
[Show Completed Plans/Appraisals](#)

Auto saving in about 14 minute(s)

100%

Create New Plan

DoD Performance Management Appraisal Program

--Choose a Plan Type--

DoD Performance Management Appraisal Program

Defense Civilian Intelligence Personnel System

National Guard (Title 32)

ation in this

plan, and track the status of a plan.

Need Help?

Create New Plan

--Choose a Plan Type--
DoD Performance Management Appraisal Program
Defense Civilian Intelligence Personnel System
National Guard (Title 32)

People in Hierarchy

The MyPerformance tool is only available to employees and supervisors whose position is covered by the new DoD Management Policy contained in DoDI 1400.25 Version 430, dated August 5, 2015, and whose organization is scheduled for immediate transition to

[Return to Main Page](#)

[Need Help?](#)

Expand All | Collapse All

| Focus Name | Occupational Code | Position Name | Organization | Performance Plan |
|--------------------|--|--|------------------------------------|------------------------|
| Stout, Tracy Ann | | | | |
| BEACH, ERICA LEIGH | 0201.Human Resources Management (0201) | D1042000.HUMAN RESOURCES SPECIALIST.411268.NGAR.TECH | VTARNG ELEMENT JF HQ NGARW8BFAA 01 | Create |
| WING, ROBIN MARIE | 0201.Human Resources Management (0201) | D1057000.HUMAN RESOURCES SPECIALIST (EMPLOYEE BENEFITS).461258.NGAR.TECH | VTARNG ELEMENT JF HQ NGARW8BFAA 01 | Create |

[Privacy Statement](#)

100%

This page list the employees linked to the supervisor in the Organizational Hierarchy.

Click on “Create” for the selected employee.

Supervisors can only create performance plans for employees in their hierarchy.

Contact HRO for employees not in your hierarchy.

The Supervisory Commitment Statement must be acknowledged each time a supervisor go into an employee's performance plan.

This applies to AGR supervisors as well as Technician supervisors.

Confirmation

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.

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 goals; establish open communication; monitor and evaluate employee performance; recognize and reward performance and appropriately address deficient performance.

Acknowledge

Table 1 – Create Performance Plan page - Setup Details fields and descriptions

Description of the fields in the Plan Setup Details.

The Rating Official Guide uses tables like this to identify the data in each field.

| 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 |

DoD Performance Management Appraisal Program

Create Performance Plan

The Plan Details page default to Annual Appraisal-DoD type.
MyPerformance default to the standard appraisal period dates.

The Rating Official and HLR are drawn from the hierarchy.
Contact HRO if the wrong names are there or are blank.
Click “Build New Plan”

* Appraisal Type **Annual Appraisal - DoD**

TIP The Appraisal Period Start Date represents the start of the employee’s performance evaluation period under this plan. Please review and change this date, if necessary.

* Appraisal Period Start Date **01-Apr-2017**

* Appraisal Period End Date **31-Mar-2018**

Appraisal Effective Date **01-Jun-2018**

* Rating Official Name

* Higher Level Reviewer Name

Build New Plan

Auto saving in about 14 minute(s)

Plan shell has been established.

User can navigate using the tabs which are now available or click “Save and Continue” to go to the next page.

The screenshot shows the 'Appraisal Program' web interface. At the top, there are tabs for 'Plan' and 'View/Print Form'. Below these are four main steps: 'Step 1: Plan Details', 'Step 2: Mission Goals', 'Step 3: Performance Elements and Standards', and 'Step 4: Approvals and Acknowledgments'. A red box labeled 'Navigation' has three arrows pointing to the 'Step 1: Plan Details' tab, the 'Step 2: Mission Goals' tab, and the 'Save and Continue' button at the bottom right. The main content area includes 'Employee Information', instructions for using the screen, a 'TIP' about the 'Choose an Action' dropdown, and a form with fields for 'Appraisal Type', 'Appraisal Period Start Date', 'Appraisal Period End Date', and 'Appraisal Effective Date'. The 'Created By' field is populated with 'Stout, Tracy Ann'. A 'Save and Continue' button is located at the bottom right of the form area.

Next step is to enter Mission Goals.

Note the reminder to discuss the DoD Core Values when your employee reviews their performance plan.

DoD Core Values MUST be incorporated into the Mission Goal.

Click Save and Continue.

Employee Information

Employee Name
▶ Show Employee []

DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, 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 performance 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 document.
- Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards.
- Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Details.

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

ENTER MISSION GOALS HERE

(Limit to 1000 characters)

Spell Check Counter 26

Save and Go Back Save and Continue

Auto saving in about 14 minute(s) 100%

Next step is to enter properly formatted Performance Elements. Minimum of 1 Performance Element is required but no more than 10 maximum. Weighting is not used in this program and all Performance Elements are Critical.

Employee Information

Employee Name
▶ Show Employee [

This screen allows you to add or update a performance element and view approved performance elements for your employee. Performance elements should be written using the SMART criteria. Select **Need more information?** link to view the SMART criteria.

Step 3: Performance Elements and Standards

- Select Add Performance Element button to add a new performance element and standard(s).
- Select Update button under the Details Action column to update an unapproved performance element.
- Select View button under Details Action column to view an approved performance element.
- Select Delete icon under the Details Delete column to delete a performance element.
- Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgements.
- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

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

| Details | Number | Title | Status | Element Type | Action | Delete |
|---------|-------------------|-------|--------|--------------|--------|--------|
| | No results found. | | | | | |

[Add Performance Element](#) |

[Save and Go Back](#) [Save and Continue](#)

Auto saving in about 14 minute(s) 100%

All fields with an asterisk are required.

This screen allows you to add performance element and standard(s)

Enter the title of the Performance Element,
Performance Element Start date defaults to the start of the appraisal period.
This can be adjusted if necessary but must be within the appraisal period.

Performance Element Number **1**

* Performance Element Title

* Performance Element Start Date
(example: 15-Feb-2017)

Performance Element Status **Pending**

Date Last Modified **02-Mar-2017**

* Performance Element Type

Performance Element and Standard(s)

ENTER ALL THE SPECIFIC TASK OF THE PERFORMANCE ELEMENT AND THE FULLY ACCEPTABLE STANDARD TO ACCOMPLISH IT BY
USE THE SMART FORMAT

(Limit to 1500 characters)

Spell Check Counter **132**

Auto saving in about 15 minute(s)

100%

Add Performance Element and Standard(s)
* Indicates required field

This screen allows you to add performance element and standard(s)

- Enter the Performance Element title and verify the Performance Element Start Date.
- Enter your performance element and standard(s) in the text box or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save and add a new performance element and standard(s)

Click “Save and Add Another Performance Element” until all Elements are added.

Click “Go Back to Performance Elements” page when done.

Performance Element Status **Pending**
Date Last Modified **02-Mar-2017**

* Performance Element Type

Performance Element and Standard(s)

ENTER ALL THE SPECIFIC TASK OF THE PERFORMANCE ELEMENT AND THE FULLY ACCEPTABLE STANDARD TO ACCOMPLISH IT BY
USE THE SMART FORMAT

(Limit to 1500 characters)

Spell Check Counter **132**

Auto saving in about 15 minute(s)

https://potter.dcpds.cpms.os... DCPDS PORTAL Appraisal Details

File Edit View Favorites Tools Help

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DoD Performance Management MyBiz+ Logout

You can review, update or delete Performance Elements from this page.

Plan | View/print Form

Step 1: Plan Details | Step 2: Mission Goals | **Step 3: Performance Elements and Standards** | Step 4: Approvals and Acknowledgments

Go

Employee Information

Employee Name
 ▶ Show Employee I

This screen allows you to add or update a performance element and view approved performance elements for your employee. Performance elements should be written using the SMART criteria. Select **Need more information?** link to view the SMART criteria.

Step 3: Performance Elements and Standards

- Select Add Performance Element button to add a new performance element and standard(s).
- Select Update button under the Details Action column to update an unapproved performance element.
- Select View button under Details Action column to view an approved performance element.
- Select Delete icon under the Details Delete column to delete a performance element.
- Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgements.
- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

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

Add Performance Element |

Show All Details | Hide All Details

| Details | Number | Title | Status | Element Type | Action | Delete |
|---------|--------|------------------------------|---------|--------------|------------------------|--------|
| ▶ | 1 ▼ | TITLE OF PERFORMANCE ELEMENT | Pending | Critical | Update | |

Save and Go Back | Save and Continue

Auto saving in about 14 minute(s) 100%

Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | **Step 4: Approvals and Acknowledgments**

Employee Information

Employee Name
▶ Show Employee I

• Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

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

| Details | Number | Title | Status | Element Type | Action | Delete |
|---------|--------|------------------------------|---------|--------------|--------|--------|
| ▶ | 1 | TITLE OF PERFORMANCE ELEMENT | Pending | Critical | Update | 🗑️ |

Save and Go Back | Save and Continue

Auto saving in about 14 minute(s) | 100%

When all elements are added click: Step 4: Approvals and Acknowledgments tab or click another option.

Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | **Step 4: Approvals and Acknowledgments**

Employee Information

Employee Name
▶ Show Employee I

The performance plan can be transferred to the employee for review and input but if the employee has already provided input go to Approvals and Acknowledgments tab to transfer to HLR.

- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

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

| Details | Number | Title | Status | Element Type | Action | Delete |
|---------|--------|------------------------------|---------|--------------|--------|--------|
| ▶ | 1 | TITLE OF PERFORMANCE ELEMENT | Pending | Critical | Update | 🗑️ |

Save and Go Back | Save and Continue

Auto saving in about 14 minute(s) | 100%

Click Step 1: "Start" to begin the Approvals and Acknowledgments process.

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

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

| 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 3 must be completed |

Save and Go Back

Auto saving in about 14 minute(s) 100%

The screenshot shows a web browser window with the URL https://potter.dcpds.cpmis.osd.mil/OA_HTML/OA. The page title is "Appraisal Details". A red box highlights the section "Option A - Transfer to the Higher Level Reviewer".

Option A - Transfer to the Higher Level Reviewer

| Name | Title |
|------------------------|-----------------------|
| Stout, Tracy Ann | Rating Official |
| Morgan, Michael Ronald | Higher Level Reviewer |

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer:

Select Option A to transfer the performance plan to the HLR
The HLR will "Approve" or "Return the Plan for Change" then back to the rater for final approval.

Notice: You are about to contact Morgan, Michael Ronald by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information.

Buttons:

Option B - Document the higher level review has taken place by entering the following information

Higher Level Reviewer:

Review Date:

Method of Review:

Other Method:

Buttons:

| | | |
|--|-------------|--------------------------------------|
| Step 2: Higher Level Reviewer - Review (if required) | Not Started | Not Started |
| Step 3: Rating Official - Document Communication to Employee | Not Started | <input type="button" value="Start"/> |
| Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Auto saving in about 14 minute(s)

https://potter.dcpds.cpmc.osd.mil/OA_HTML/OA DCPDS PORTAL Appraisal Details

File Edit View Favorites Tools Help

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Option A - Transfer to the Higher Level Reviewer

| Name | Title |
|------------------------|-----------------------|
| Stout, Tracy Ann | Rating Official |
| Morgan, Michael Ronald | Higher Level Reviewer |

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer

Message to Higher Level Reviewer

Use Option B if the Rating Official and the HLR are the same or if the HLR is not available.

This option will capture the HLR signature but not transfer the plan.

Notice: You are about to contact Morgan, Michael Ronald by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act i

Option B - Document the higher level review has taken place by entering the following information

Higher Level Reviewer

Review Date

Method of Review

Other Method

| | | |
|--|-------------|--------------------------------------|
| Step 2: Higher Level Reviewer - Review (if required) | Not Started | Not Started |
| Step 3: Rating Official - Document Communication to Employee | Not Started | <input type="button" value="Start"/> |
| Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Auto saving in about 14 minute(s)

100%

https://potter.dcpds.cpms.osd.mil/OA_HTML/OA DCPDS PORTAL Appraisal Details

Option A - Transfer to the Higher Level Reviewer

| Name | Title |
|------------------------|-----------------------|
| Stout, Tracy Ann | Rating Official |
| Morgan, Michael Ronald | Higher Level Reviewer |

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer

Fill in the required information for either option, click Transfer with Email Notification or Save

Spell Check

Notice: You are about to contact Morgan, Michael Ronald by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act i

Cancel Transfer to Higher Level Reviewer without E-mail Notification Transfer to Higher Level Reviewer

Option B - Document the higher level review has taken place by entering the following information

Higher Level Reviewer Method of Review

Review Date Other Method

Cancel Save

| | | |
|--|-------------|--------------------------|
| 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 3 must be completed |

Auto saving in about 14 minute(s) 100%

https://potter.dcpds.cpmis.osd.mil DCPDS PORTAL Confirmation

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Confirmation

I certify that the information in this performance plan accurately documents the Rating Official's decisions and the Higher Level Reviewer's approval.

Once you have selected the desired option, Click Yes to Confirm approval

No Yes

Confirmation

I certify that the information in this performance plan accurately documents the Rating Officials decisions and the Higher Level Reviewer's approval

Privacy Statement 100%

https://potter.dcpds.cpms.osd.mil DCPDS PORTAL Appraisal Details

File Edit View Favorites Tools Help

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Plan View/Print Form

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments

-- Choose an Action -- Go

The next step for Approvals and Acknowledgments is Step 3: Document Communication to Employee

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

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) | Completed | Step 1 completed |
| ▶ | Step 2: Higher Level Reviewer - Review (if required) | Completed | Step 2 completed |
| ▶ | Step 3: Rating Official - Document Communication to Employee | Not Started | Start |
| ▶ | Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Save and Go Back

Auto saving in about 14 minute(s) 100%

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards **Step 4: Approvals and Acknowledgments**

Employee Information

Employee Name
▶ Show Employee

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.

Start Step 3, fill in the Communication Date and Method of Communication. If Other method is selected you must enter something in the Other field.

| Details | Tasks | Status | Action |
|---------|---|-------------|--------------------------------------|
| ▶ | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Completed | Step 1 completed |
| ▶ | Step 2: Higher Level Reviewer - Review (if required) | Completed | Step 2 completed |
| ▲ | Step 3: Rating Official - Document Communication to Employee | Not Started | <input type="button" value="Start"/> |
| ▶ | Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |

Communication Date

Communication Method

Other

Auto saving in about 14 minute(s)

Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | **Step 4: Approvals and Acknowledgments**

– Choose an Action – [Go]

Employee Information

Employee Name
▶ Show Employee

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

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

Communication Date [] [?]
Communication Method []
Other []

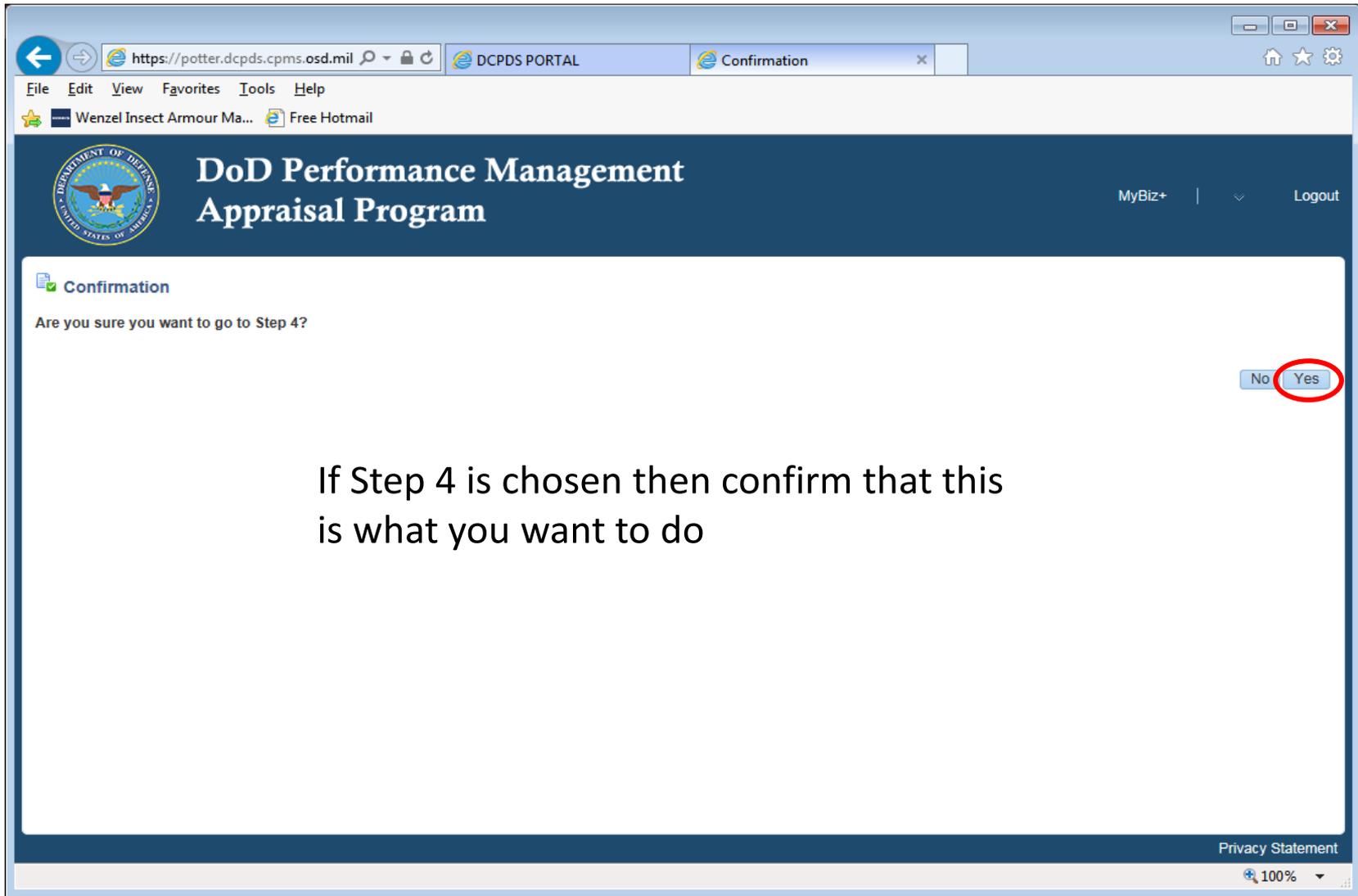
[Cancel] **Save and Transfer to Employee for Acknowledgment** **Save and go to Step 4**

| | | |
|--|-------------|--------------------------|
| ▶ Step 4: Rating Official - Document Employee Acknowledgment | Not Started | Step 3 must be completed |
|--|-------------|--------------------------|

[Save and Go Back]

Auto saving in about 14 minute(s) [100%]

There **MUST** be employee acknowledgement of the performance plan. Save and Transfer to Employee for Acknowledgment or Save and Go to Step 4 if the employee is unavailable or unable or unwilling to sign.



The screenshot shows a web browser window with the address bar displaying `https://potter.dcpds.cpms.osd.mil`. The page title is "DCPDS PORTAL" and the current page is "Confirmation". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". There are two bookmarks: "Wenzel Insect Armour Ma..." and "Free Hotmail".

The main content area features the Department of Defense seal on the left and the title "DoD Performance Management Appraisal Program" in the center. On the right, there are links for "MyBiz+", a dropdown arrow, and "Logout".

A confirmation dialog is displayed with the heading "Confirmation" and a green checkmark icon. The text of the dialog asks, "Are you sure you want to go to Step 4?". At the bottom right of the dialog, there are two buttons: "No" and "Yes". The "Yes" button is circled in red.

At the bottom right of the page, there is a "Privacy Statement" link and a zoom level of "100%".

If Step 4 is chosen then confirm that this is what you want to do

Starting Step 4

Note the addition of another row of tabs

The performance plan is Approved but is not valid until the employee acknowledges the plan and performance standards.

Click the start button

- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

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

| Details | Tasks | Status | Action |
|---------|---|------------------------------------|------------------|
| > | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Completed | Step 1 completed |
| > | Step 2: Higher Level Reviewer - Review (if required) | Completed | Step 2 completed |
| > | Step 3: Rating Official - Document Communication to Employee | Completed | Step 3 completed |
| > | Step 4: Rating Official - Document Employee Acknowledgment | <u>Pending Empl Acknowledgment</u> | Start |

Save and Go Back

Auto saving in about 14 minute(s)

100%

Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | **Step 4: Approvals and Acknowledgments**

-- Choose an Action -- [Go]

Employee Information

Employee Name
▷ Show Employee [C]

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

Enter the acknowledgment, if Other is selected then the Other block must have value. Click Save

Show All Details | Hide All Details

| Details | Tasks | Status | Action |
|---------|---|-----------------------------|------------------|
| ▷ | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Completed | Step 1 completed |
| ▷ | Step 2: Higher Level Reviewer - Review (if required) | Completed | Step 2 completed |
| ▷ | Step 3: Rating Official - Document Communication to Employee | Completed | Step 3 completed |
| ▲ | Step 4: Rating Official - Document Employee Acknowledgment | Pending Empl Acknowledgment | [Start] |

TIP These fields are auto-populated at the time of employee acknowledgment. If the employee is not available or refuses to acknowledge, you may update this area accordingly.

Acknowledgment
Other Method
Date

- Unable to Sign
- Other
- No System Access
- Employee Declined

[Cancel] [Save]

[Save and Go Back]

Auto saving in about 14 minute(s) 100%

Performance Plan is now completed and Approved.

The Approvals and Acknowledgement process is REQUIRED for all events in DPMAP

The Annual Appraisal will not process through the system unless ALL steps are completed.

Select Save and Go Back to review or Return to Main Page and click Go

Employee Information

Employee Name
▶ Show Employee D

This screen allows you to view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

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

Show All Details | Hide All Details

| Details | Tasks | Status |
|---------|---|-----------|
| ▶ | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Completed |
| ▶ | Step 2: Higher Level Reviewer - Review (if required) | Completed |
| ▶ | Step 3: Rating Official - Document Communication to Employee | Completed |
| ▶ | Step 4: Rating Official - Document Employee Acknowledgment | Completed |

Available Actions:
-- Choose an Action --
Change Rating Official or Higher Level Reviewer
Transfer to Employee
Track Progress
Return to Main Page

Go

Save and Go Back

Auto saving in about 14 minute(s)

100%

From the Action Menu on the My Performance Main Page options are;

- Update a performance plan
- Transfer to Employee
- Change RO and/or HLR
- View or Print DD FORM 2904, DoD Performance Plan and Appraisal

Selecting “Close” will close the performance plan and make it unavailable

Select Track Progress to review the events of the performance cycle.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Show Me Appraisal Year

Create New Plan

Records Displayed

| Employee Name | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current Status | Action |
|-------------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------------|---|
| | | | 2017 | 760705 | 22-Jan-2016 | NG | Approved | Interim Review Completed | <input type="button" value="Update"/> |
| LEIGH WING, ROBIN MARIE | Stout, Tracy Ann | Stout, Tracy Ann | 2017 | 760462 | 22-Jan-2016 | NG | Approved | Interim Review Completed | <input type="button" value="Update"/> |
| | | | 2018 | 322 | 02-Mar-2017 | DoD | Approved | Plan Approved | <input type="button" value="Update"/> <ul style="list-style-type: none"> Transfer to Employee View/Print Form Change RO and/or HLR Close Track Progress Manage Guest Participants |

Select the link to search for Completed Plans.

Auto saving in about 14 minute(s)

Browser window: <https://potter.dcpds.cpms.os...> | DCPDS PORTAL | Track Progress

File Edit View Favorites Tools Help

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Track Progress

Go Back Print

Employee Information

Employee Name **WING, ROBIN MARIE**
 ▶ Show Employee Details

This screen provides information regarding the status of the performance plan/appraisal throughout the performance cycle.

- Review the performance plan/appraisal status and select Go Back button at top right corner when finished.
- A Print button is located at the top right corner, if you would like to print Track Progress.

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

| Plan | Date | User | |
|---|-------------|------------------|-------------------------------------|
| Drafted | 02-Mar-2017 | Stout, Tracy Ann | <input checked="" type="checkbox"/> |
| Reviewed by Higher Level Reviewer | 02-Mar-2017 | Stout, Tracy Ann | <input checked="" type="checkbox"/> |
| Approved | 02-Mar-2017 | Stout, Tracy Ann | <input checked="" type="checkbox"/> |
| Communicated to Employee by Rating Official | 02-Mar-2017 | Stout, Tracy Ann | <input checked="" type="checkbox"/> |
| Acknowledged by Employee | 02-Mar-2017 | Stout, Tracy Ann | <input checked="" type="checkbox"/> |
| Progress Review | | | |
| Employee Input | | | <input type="checkbox"/> |
| Rating Official - Assessment | | | <input type="checkbox"/> |
| Reviewed by Higher Level Reviewer - If Required | | | <input type="checkbox"/> |
| Communicated to Employee by Rating Official | | | <input type="checkbox"/> |
| Acknowledged by Employee | | | <input type="checkbox"/> |
| Appraisal | | | |
| Employee Input | | | <input type="checkbox"/> |
| Rating Official - Assessment | | | <input type="checkbox"/> |
| Higher Level Reviewer Approved | | | <input type="checkbox"/> |
| Communicated to Employee by Rating Official | | | <input type="checkbox"/> |

Auto saving in about 14 minute(s) 100%

Progress Reviews

Employee Information
Employee Name **WING, ROBIN MARIE**
[Show Employee Details](#)

This screen allows you to create, update or view completed progress reviews. Progress Reviews are performance discussions that must be documented in the MyPerformance tool. Employees must have at least one documented progress review which typically occurs midway through the performance cycle.

- Select Create Progress Review button to create a progress review.
- Select Update button under Action column to update a progress review.
- Select View History button under Action column to view history of progress reviews.

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

| Number | Created By | Communication Method | Employee Ack Date | Action | Delete |
|-------------------|------------|----------------------|-------------------|--------|--------|
| No results found. | | | | | |

Create Progress Review

One documented Progress Review must be accomplished for each employee usually halfway through performance cycle

Progress Reviews

https://potter.dcpds.cpmis.osd.mil/OA_HTML/OA.jsp: DCPDS PORTAL Appraisal Details

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DoD Performance Management Appraisal Program MyBiz+ Logout

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Participants

-- Choose an Action -- Go

Employee Information
Employee Name
Show Employee |

Click on Create Progress Review

This screen allows you to create, update or view completed progress reviews. Progress Reviews are performance discussions that must be documented in the MyPerformance tool. Employees must have at least one documented progress review which typically occurs midway through the performance cycle.

- Select Create Progress Review button to create a progress review.
- Select Update button under Action column to update a progress review.
- Select View History button under Action column to view a completed progress review.

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

Create Progress Review

| Number | Created By | Creation Date | Higher Level Review Date | Status | Communication Date | Communication Method | Employee Ack Date | Action | Delete |
|-------------------|------------|---------------|--------------------------|--------|--------------------|----------------------|-------------------|--------|--------|
| No results found. | | | | | | | | | |

Auto saving in about 14 minute(s) Privacy Statement 100%

Progress Reviews

Progress Reviews Information area

[Go Back to Progress Reviews](#)

The Progress Review screen has 2 tabs One for the assessment and another for approvals and acknowledgments

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 elements and standards.

Progress Review Initiator: Stout, Tracy
Progress Review Status: Initiated
Progress Review Number: 1

Assessments | Approvals and Acknowledgments

This screen allows you to view your employee's performance elements and standards and input and enter your assessments.

- Select Radio button next to the performance element and standard(s) you want to view and enter assessments.
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s).
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

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

Performance Elements

| Select | Order | Performance Element Title | Status | Performance Element Type |
|----------------------------------|-------|---------------------------|----------|--------------------------|
| <input checked="" type="radio"/> | 1 | Performance Element | Approved | Critical |

Performance Element and Standard(s)

Auto saving in about 14 minute(s)

100%

Progress Reviews

The screenshot shows a web browser window with the following content:

- Address bar: https://potter.dcpds.cpmosd.mil/OA_HTML/OA.jsp
- Page Title: DCPDS PORTAL - Appraisal Details
- Menu: File, Edit, View, Favorites, Tools, Help
- Table:

| Select | Order | Performance Element Title | Status | Performance Element Type |
|----------------------------------|-------|---------------------------|----------|--------------------------|
| <input checked="" type="radio"/> | 1 | Performance Element | Approved | Critical |
- Section: **Performance Element and Standard(s)**
Text: add performance element here
- Section: **Employee Input**
Text: Employees must be offered the opportunity to provide input here
- Section: **Rating Official Assessment**
Text: Rating official assessment goes here
- Footer: Auto saving in about 15 minute(s)

Once the employee and the rating official have entered their input, complete the steps on the Approvals and Acknowledgements tab.

Annual Appraisals

Annual Appraisal is located on the first row of tabs in the employee's performance plan

The Annual Appraisal is completed at the end of the appraisal period.

Appraisal Type: Annual Appraisal - DoD
Appraisal Effective Date: 01-Jun-2018
Appraisal Period Start Date: 01-Apr-2017
Appraisal Period End Date: 30-Mar-2018

| Select | Order | Performance Element Title | Status | Performance Element Type | Rating |
|----------------------------------|-------|---------------------------|----------|--------------------------|--------|
| <input checked="" type="radio"/> | 1 | Performance Element | Approved | Critical | |

Annual Appraisals

Assessments and Ratings Rating of Record Approvals and Acknowledgments

Employee Information

Employee Name WING, ROBIN MARIE
[Show Employee Details](#)

Appraisal Type Annual Appraisal - DoD
Appraisal Effective Date 01-Jun-2018

Appraisal Period Start Date 01-Apr-2017
Appraisal Period End Date 30-Mar-2018

| Select | Order | Performance Element Title | Status | Performance Element Type | Rating |
|----------------------------------|-------|---------------------------|----------|--------------------------|--------|
| <input checked="" type="radio"/> | 1 | Performance Element | Approved | Critical | |

Performance Element and Standard(s)

add performance element here

Auto saving in about 14 minute(s)

Annual Appraisals

After employee and Rater inputs have been entered the Rating of Record can be entered at the bottom of the assessment screen. Select Go to Next Performance Element until all elements have been assessed and rated. Then complete the Approvals and Acknowledgments

Employee Assessment

Rating Official Assessment

Employee Assessment

Rating of Record

(Limit to 2000 characters)

Spell Check Counter

Performance Element Rating

Element Rating ⓘ

Go to Next Performance Element Go Back to Top of Page

Auto saving in about 14 minute(s)

100%

Performance Narrative Statements

- Performance Narrative Statements are required whenever there is a change to the employee's supervisor. This can result from a position change for the employee or a re-assignment of a supervisor.
- A Performance Narrative Statement is a non-rated assessment of an employees performance based on their established performance standards. This assessment becomes part of the performance plan and is available for the new supervisors consideration.
- The outgoing supervisor is responsible to complete the Performance Narrative Statement then changes the Rating Official and/or HLR to the employees new rating official. This essentially transfers the plan to the new rater. Do NOT create a new plan for a change in supervisors or job.
- The new rating official must review the performance plan, edit the performance elements for the employees new job and re-approve the performance plan.
- Performance Narrative Statements were formerly called Closeout Assessments.

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

DCPDS PORTAL

Appraisal Details

File Edit View Favorites Tools Help

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Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Participants

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments

-- Choose an Action -- Go

Employee Information

Employee Name
Show Employee D

This screen allows you to start the approval process or view approval information and status of the e

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approval and acknowledgment information (date, method, etc.) and Hide All Details link to collapse all steps.

Show All Details | Hide All Details

| Details | Tasks | Status | Action |
|---------|---|-----------------------------|------------------|
| > | Step 1: Rating Official - Request or Document Higher Level Review (if required) | Completed | Step 1 completed |
| > | Step 2: Higher Level Reviewer - Review (if required) | Completed | Step 2 completed |
| > | Step 3: Rating Official - Document Communication to Employee | Completed | Step 3 completed |
| > | Step 4: Rating Official - Document Employee Acknowledgment | Pending Empl Acknowledgment | Start |

Save and Go Back

Auto saving in about 14 minute(s)

100%

Narrative Statements are written the same way Progress Reviews are except a Narrative Statement identifies a change in rating official

https://potter.dcpds.cpmc.osd.mil/OA_HTML/OA.jsp

DCPDS PORTAL

Appraisal Details

File Edit View Favorites Tools Help

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DoD Performance Management Appraisal Program

MyBiz+ | Logout

Plan Progress Reviews Annual Appraisal Narrative Statements **View/Print Form** Manage Guest Participants

Reports

-- Choose an Action -- Go

Enterprise Information

Click View/Print Form to review DD Form 2906-DoD Civilian Performance Plan, Progress Review and Appraisal

- Select View/Print Form button at bottom right corner to view/print a working copy of the form.
- The working copy of the form is displayed as a PDF file that you can save and/or print.

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

Then click View/Print Form to open the PDF

View/Print Form

Auto saving in about 15 minute(s)

Privacy Statement

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https://potter.dcpds.cpmis.osd.mil/OA_HTML/OA.jsp: DCPDS PORTAL Appraisal Details

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Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form **Manage Guest Participants**

-- Choose an Action -- Go

Employee Information

Employee Name
> Show Employee I

Need Help?

This screen allows a rating official to request guest participants, other than the rating official or employee, to contribute to this appraisal.

- Add Participant button – Allows you to add guest participants.
- Request Feedback button – Once a participant is selected, allows you to request their feedback.
- Prevent Feedback button – Allows you to prevent feedback if the Participation Status is 'Feedback Requested'.

Select Participant Request Feedback Prevent Feedback **Add Participant**

| Select | Full Name | Participation Type | Participation Status | Participation Status Date | Date Completed | Action |
|-------------------|-----------|--------------------|----------------------|---------------------------|----------------|--------|
| No results found. | | | | | | |

Auto saving in about 14 minute(s) Privacy Statement 100%

Guest Participants can be added to provide input to an employees performance plan and assessments.
This is useful if you have an employee on another detail

Questions?

