



**National Security
Personnel System**



Performance Appraisal Application user guide

Version 1 – October 2006

User Guide

National Security Personnel System (NSPS) Performance Appraisal Application (PAA)

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About This Guide

What Is the Performance Appraisal Application?

The Performance Appraisal Application (PAA) is one of two electronic support tools developed to help employees and supervisors manage performance under the National Security Performance System (NSPS). The PAA streamlines and automates performance management processes and documentation requirements and makes it easier and more efficient to track and monitor performance.

Who Should Use This Guide

The PAA User Guide is for employees and rating officials (usually managers or supervisors) who must enter or edit information contained in the NSPS performance plan. This information includes job objectives, contributing factors, interim review conversation results, self-assessments, evaluations, and rating official recommendations.

How the Guide Is Structured

This guide helps you get started with the PAA and serves as a reference whenever you need assistance with a particular function. There are two major sections in this guide:

- ***Performance Appraisal Application Procedures for Employees*** — Shows employees how to work in the PAA. Work is divided into tasks that are presented under major headings with step-by-step procedures and screen captures. A brief description of the purpose and work context of both tasks and procedures is included.
- ***Performance Appraisal Application Procedures for Rating Officials*** — Shows rating officials how to work in the PAA. Work is divided into tasks, which are presented under major headings with step-by-step procedures and screen captures. A brief description of the purpose and work context of both tasks and procedures is included.

If you need to know how to perform a specific task or procedure, use the table of contents to locate the information.

Role-based Structure of the Performance Appraisal Application

Although the performance management process applies to all employees under NSPS, there are specific roles and tasks that are performed by two different categories of users: employees and rating officials.

The employee tasks involve inputting information into one's own performance plan and self-assessment. Rating official tasks are primarily concerned with determining the performance plans and ratings for employees whom the rating official is evaluating.

As an employee, you use the PAA to:

- Initiate or participate in the development of your performance plan
- View and edit information related to your performance plan
- Enter job objectives, self-assessments, and other information related to your performance plan and appraisal
- Route information to your rating official
- Acknowledge that performance-related results have been communicated to you

As a rating official, you use the PAA to:

- Initiate and edit information related to your employees' performance plans
- Enter job objectives, assessments, and other information related to your employees' performance plans or appraisals
- Approve performance plans, interim reviews, and annual appraisals
- Route performance plan and appraisal information to your employees
- Submit recommended ratings
- Edit ratings
- Change rating official assignments

Employees and rating officials are differentiated in the PAA by assignment to different permission levels that define the screens and functions used to perform its respective tasks. These permissions make the PAA a highly controlled environment: what a person at one permission level sees and does can be very different from someone assigned a different permission level. Permission levels, which are controlled via user ID and password, protect information from being accessed by unauthorized individuals.

You can access PAA screens by one of two links: [My Biz](#) and [My Workplace](#). [My Biz](#) is the employee link for managing one's own individual information. [My Workplace](#) is the link that allows rating officials to access performance plans and appraisals for each employee for whom they are responsible. Employees who are also rating officials (normally, anyone who is a supervisor) will see [My Biz](#) and [My Workplace](#). Employees with no rating responsibilities will see only [My Biz](#).

Transfer, Sharing, and Ownership of Appraisal Records

The PAA allows employees and rating officials to transfer performance plans back and forth. Both roles can review the performance plan online, make contributions to it, and then transfer the performance plan back. Employees and rating officials can share the performance plan as often as necessary during a single appraisal cycle.

Either the employee or the rating official "owns" the performance plan at any given time. Employees transfer ownership by transferring performance plans to rating

officials, and rating officials transfer ownership back to employees in the same way. When the employee owns the performance plan, the rating official:

- Cannot update the performance plan unless the rating official retrieves it.
- Can see all sections of the performance plan. Any changes the employee makes to an in-progress self-assessment or overall feedback are not visible to the rating official until the employee transfers the appraisal record again.

When the rating official owns the appraisal record, employees:

- Cannot update the performance plan.
- Can view the performance plan for information only up to the last sharing point. Any changes the rating official makes to an in-progress performance plan after resuming ownership are not visible to the employee until the rating official transfers the appraisal record again.

Conventions

Standard conventions for format and layout are used in this guide to make it easier for you to view and understand information. The conventions are as follows:

Item	Convention
Tabs	Bold <i>Example:</i> Select the Notifications tab.
Links	Underlined <i>Example:</i> Select <u>Show All Details</u> .
Buttons	Bold; identified as a button <i>Example:</i> Select the Apply button.
Icons	Bold; identified as an icon <i>Example:</i> Select the Details pencil icon.
Column Heads	Bold <i>Example:</i> The icon is located in the Update column.
Field Names	Bold <i>Example:</i> Enter the date in the Appraisal Effective Date field in DD-MMM-YYYY format (20-OCT-2006).
Page Names	Italics <i>Example:</i> Select <u>Update Action</u> to go to the <i>Details: Employee</i> page.

Item	Convention
Section Names	Italics <i>Example:</i> Navigate down the page to the <i>Job Objectives</i> section.
Drop-down List Items	Title Case <i>Example:</i> Select Performance Plan from the Create drop-down list.
Variable portion of Page Name	Brackets [] <i>Example:</i> Select <u>My Biz</u> → <u>NSPS Appraisals (My Biz)</u> to go to the Main page with the <i>Appraisals of [employee name]</i> section displayed.

Steps

Steps are numbered and used to identify the actions required to complete a task. The table above and on the previous page describes the conventions used within a step to distinguish field names and other screen items, and provides an example of how each is used in a step.

Caution Icon

The caution icon is used to provide warnings. For example:



Do not use your browser **Back** button to return to the previous page.

Notes Icon

The notes icon supplies additional information. This may include NSPS policy information or details that do not relate directly to a step. For example:



NSPS requires that an employee be assigned at least one job objective.

Explanation Text

Explanation text located directly under a step provides additional information that might prove useful when completing a step or task. For example:

1. Perform a search to obtain a list of completed appraisals.

If you need additional information on searching, refer to the section titled *Performing a Search* in the appendix of this guide.

Follow-on Menu or Button Selections

Used to indicate when a menu or series of buttons is needed to complete a step. The item after the right-facing arrow indicates the follow-on item to select. For example:


2. Select **Action** → **Exit**.

Field Descriptions

Most fields in the PAA are required. In field description tables, only optional fields are labeled. Default values are included in descriptions.

Using the Back Button

The ability to navigate to the previous page is provided on each page. If you want to move to a previous page, select one of the following:

- The **Back** button () at the top of your page;

OR

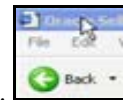
- The Return to..... link in the lower left-hand corner of your page;

OR

- The **Cancel** button ().



Do not use the browser **Back** button to return to the previous page.



Cutting/Copying and Pasting

You can cut or copy and paste from another document into the PAA. Be aware that special characters may appear incorrectly in the field into which you are pasting the text. Take the time to review the text closely after you have pasted it. You may not see the characters the way they will actually appear (that is, incorrectly) in the system until you save your changes for that page.

Future Versions of this Guide

This guide contains information current as of the October 2006 version of the PAA. This guide will be updated as new features become available.

Performance Appraisal Application Procedures for Employees

The PAA stores, organizes, manipulates, and routes information regarding all aspects of the NSPS performance management process, including performance plans and appraisals. This section focuses on the employee's use of the system and details how to use the PAA to enter and edit to your own performance plan and self-assessments for interim and annual performance reviews.

Transfers and information-sharing is an important component of the activities covered in this guide. The following list outlines the sequence of tasks you and your rating official perform when using the PAA during the performance management cycle. The bold, italicized tasks are employee tasks and are covered in this section.

Performance Plan (Plan Phase)

- 1. The employee or rating official creates the performance plan.***
- 2. The employee and rating official edit the performance plan until it is finalized.***
3. The rating official approves the job objectives.
- 4. The employee acknowledges the performance plan.***
5. The rating official approves the performance plan.

Interim Review (Monitor Phase)

6. The rating official creates the interim review.
- 7. The employee provides an interim review self-assessment (optional).***
8. The rating official enters the assessment for the interim review.
- 9. The employee acknowledges the interim review.***
10. The rating official approves the interim review.

Annual Appraisal (Rate Phase)

11. The rating official transfers the appraisal to the employee to provide a self-assessment and may conduct a conversation with the employee as part of an end-of-cycle review.
- 12. The employee provides a self-assessment (optional).***
13. The rating official reviews the employee's self-assessment (if applicable).
14. The rating official submits his or her assessment and recommended rating for higher-level review and approval.
15. The pay pool panel reviews and approves the appraisal (using another online application outside of the PAA).
16. The rating official changes his or her rating of the employee, if necessary (in the PAA).
17. The rating official indicates that the appraisal was communicated to the employee.
- 18. The employee acknowledges that the appraisal was communicated to him or her.***

Before you can perform any tasks, you must access the PAA. Follow the steps described below.

Logging on to the Performance Appraisal Application

To access the PAA, you must log on to SSHR and then navigate to the PAA.

Follow these steps to log on to the PAA:



If you do not have log-on information, contact your Component.

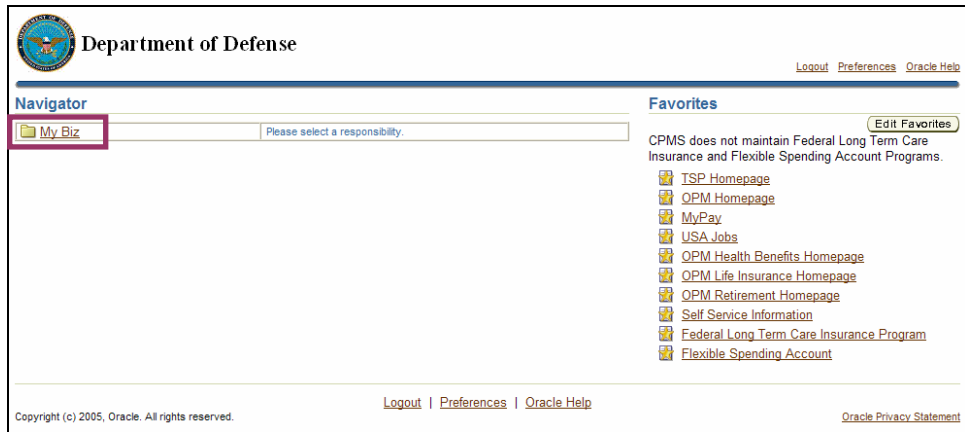
1. Open your Web browser.
2. Enter the Web site address (different for each Component).



To get more information on how to access and log on to SSHR, visit your Component home page or <http://www.cpms.osd/mil/regmod/selfservice>.

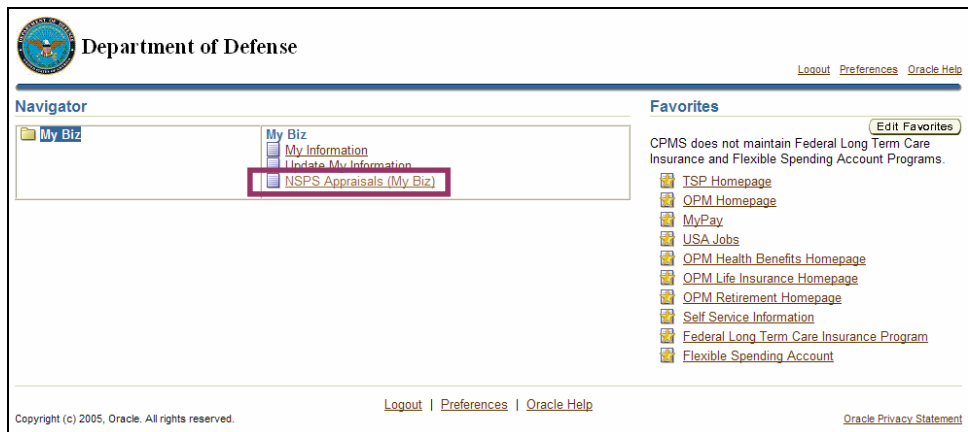
Log-on screen for SSHR

3. Enter your user name and password.
4. Select the **Login** button to go to the *Navigator* page.



My Biz on the Navigator page

5. Select My Biz to retrieve the list of activities available to you.



My Biz → NSPS Appraisals (My Biz) on the Navigator page

6. Select NSPS Appraisals (My Biz) to go to *My Plans/ Appraisals*, the main page for employees, as described in the next section.

Congratulations!

You have successfully logged on to the PAA.

For more information on how to access and log on to My Biz or My Workplace, visit your Component home page or <http://www.cpms.osd.mil/regmod/selfservice> .

All procedures that follow presume that you are already logged on to the PAA.

Main Page for Employees: *My Plans/Appraisals*

The access procedure described in the previous section takes you to the main PAA page for employees. The main page contains items described in the following sections.

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

My Appraisals

My Plans/Appraisals

Appraisals of Smith, Jeffery

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Ongoing				

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator

Last Name, Title, First Name

Appraisal Effective Date

(example: 22-Sep-2006)

Appraisal Type

Go Clear

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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Main page for employees (*My Plans/Appraisals*)





Navigation tabs

- The **Notifications** tab alerts you when something has been routed to you.
- The **Appraisals** tab is the main (default) page. It allows you to view your appraisal and provide feedback to your rating official.

Appraisals of [Employee Name] Section

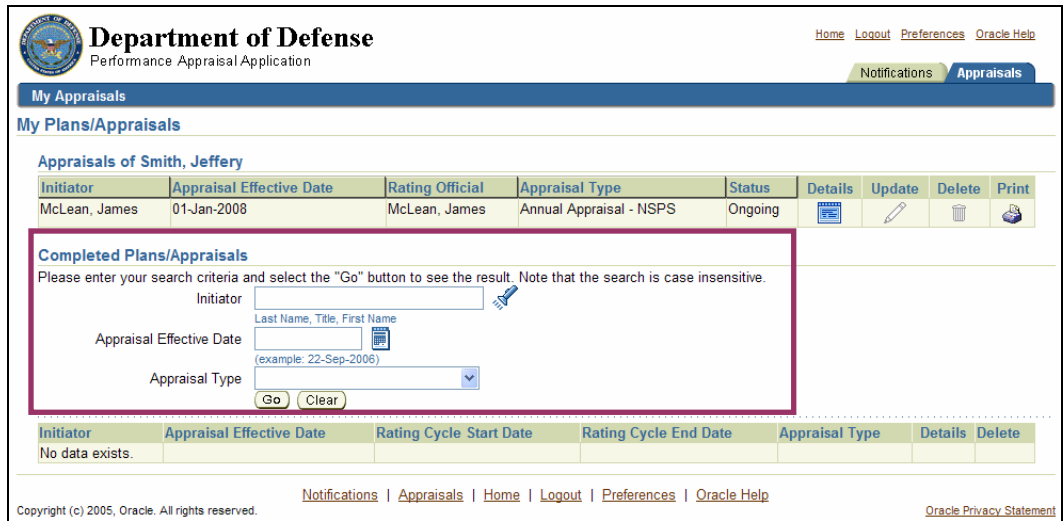
This section contains the current appraisal that has been created for you. You can interact with the appraisal using the following icons:

Icon	Description
	Selecting the Details icon displays a different set of read-only information depending on the screen on which it is located. You can view the appraisal for information only up to the last sharing point.
	The highlighted pencil under the Update column indicates that you have ownership of the appraisal.

Icon	Description
	The grayed-out pencil under the Update column indicates that the rating official has ownership of the appraisal.
	The highlighted trash can under the Delete column indicates that the appraisal can be removed permanently from the system.
	The grayed-out trash can under the Delete column indicates that the appraisal cannot be removed from the system.
	Selecting the Print icon allows you to print the form with completed information. At this time, only the performance plan will be printed and only approved job objectives will appear on the form.

Completed Plans/Appraisals Section

This section allows you to search for and see your past appraisals.



Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

My Appraisals

My Plans/Appraisals

Appraisals of Smith, Jeffery

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Ongoing				

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator

Appraisal Effective Date (example: 22-Sep-2006)

Appraisal Type

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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Completed Plans/Appraisals section of My Plans/Appraisals page

Performance Plan: Creating the Plan (Employee)

Shortly after the beginning of the rating cycle (normally October 1 of each year), you or your rating official (usually your immediate supervisor) initiate a new performance plan in the PAA.

There are two approaches to creating a performance plan:

- Your rating official notifies you that he or she would like you to create the plan, and you create it.
- Your rating official creates the plan.

In either case, you and your rating official should have a conversation, or some form of communication, regarding expectations for creating and finalizing your performance plan. In order to draft your performance plan, you need certain information such as the rating cycle start date and your relevant organizational mission/strategic goals. If you do not know this information, make sure you get it from your rating official before you begin.

The typical steps in the performance plan process are as follows. The step covered in this section is bold and italicized:

- 1. The employee or rating official creates the performance plan and enters draft job objectives and contributing factors (the rating official can enter optional weights for the job objectives as well).***
2. The employee and rating official edits or adds to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your rating official before the plan is finalized.
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to create a performance plan:

The **Go** button on the *My Plans/Appraisals* page

1. Select the **Go** button from the *My Plans/ Appraisals* page, next to the Create the Performance Plan drop-down menu, to go to the *Create Performance Plan: Setup Details* page.

Fields populated on the *Create Performance Plan: Setup Details* page with the **Next** button indicated

- Review the data in the fields on this page. The asterisk (*) on the screen indicates that the field is required. The data is auto-populated, but you can override an entry by using the drop-down list or by manually entering data to make changes.

Field	Description
Appraisal Type	The <i>Annual Appraisal —NSPS</i> option appears by default. You cannot change this option.
Rating Cycle Start Date	Normally, set the cycle start date to 01-Oct-YYYY.
Rating Cycle End Date	Normally, set the cycle end date to 30-Sep-YYYY.
Performance Plan Approval Date	This field is blank until your rating official approves the plan. After your rating official approves the plan, this field is auto-populated.
Performance Plan End Date	Normally, set the performance plan end date to be the same as the rating cycle end date, which is 30-Sep-YYYY.
Appraisal Effective Date	Normally, the appraisal effective date is 01-Jan-YYYY.
Rating Official	This field is auto-populated based on information stored in the SSHR hierarchy.
Performance Indicators	This field is auto-populated based on your pay schedule, band level, and supervisory status; however, for YP pay plans, your rating official must select the appropriate performance indicators.

- Select the **Next** button to go to the *Create Performance Plan: Overview* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Setup Details Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Rating of Record and Comments Interim Reviews Closeout Assessments

Create Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **DD48H50000 01**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Placement in Pay Band
 Current Base Salary **80979**
 Minimum Pay Band Level **74608**
 Maximum Pay Band Level **124904**

Setup Details [Return to Top](#)
 Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date
 Rating Cycle End Date **30-Sep-2007**

Relevant Organizational Mission/Strategic Goals [Return to Top](#)
 1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives [Return to Top](#)
 Add Objective

Job Objective	Status	Update	Optional	Adjusted	Job Objective	Contributing	Adjusted	Weighted	
Select Title	Details		Weight (%)	Weight (%)	Rating	Factor	Rating	Rating	Delete
No data exists.									

The **Relevant Organizational Mission/Strategic Goals** field and the **Add Objectives** button on the *Create Performance Plan: Overview* page

4. Enter your organization's goals and mission in the **Relevant Organizational Mission/Strategic Goals** field.



The text you enter in the **Strategic Organizational Mission/Strategic Goals** field becomes read-only to you after you transfer the appraisal.

5. Select the **Add Objective** button to go to the *Add Job Objective* page.



[Overview](#) [Review](#)

Add Job Objective

* Indicates required field

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

Show Relevant Organizational Mission/Strategic Goals

* Job Objective Title
(Enter up to 80 characters)

* Start Date
(example: 20-Sep-2006)

Job Objective Status

Date Last Modified 20-Sep-2006

Job Objective

(Limit to 770 characters)

[Need Help to Write Objectives](#)

Working Version Job Objective

(Limit to 2000 characters)

- Contributing Factors
- [Technical Proficiency](#)
 - [Critical Thinking](#)
 - [Cooperation and Teamwork](#)
 - [Communication](#)
 - [Customer Focus](#)
 - [Resource Management](#)
 - [Leadership](#)

[Show Additional Information on Contributing Factors](#)

Optional Weight

Job Objective Rating

[Show Job Objective Rating](#)

[Show Performance Indicators](#)

Contributing Factor Impact

[Show Contributing Factor Impact](#)

[Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating

Adjusted Weight






Weighted Rating (If Used)

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Fields and button options on the *Add Objectives* page

6. Enter the following data:

Field	Description
Job Objective Title	<p>Give a brief description of the job objective. You may enter up to 80 characters.</p> <p>The job objective title must be entered before you can select the Show Relevant Organizational Mission/Strategic Goals link.</p> <p>It is recommended that you use the following format for job objective titles: “Job Objective [#] - [description]”. This will allow your job objectives to be sorted numerically in lists.</p>
Start Date	<p>This field defaults to the current date.</p> <p>Normally it should be the same as the rating cycle start date on the <i>Create Performance Plan: Overview</i> page, but it may be different if a job objective does not become active until a later date due to an anticipated change in your job responsibilities.</p>
Job Objective Status	<p>This field auto-populates identifies whether the job objective has been approved or not. It does not populate until after data has been entered in the Job Objective field.</p>
Date Last Modified	<p>This field displays the last time data was saved in either the Job Objective or Working Version Job Objective field.</p>
Working Version Job Objective	<p>While developing job objectives, you and your rating official should use this section for the draft versions.</p> <p>The maximum limit of characters for this field is 2,000.</p> <p>When the job objective has been approved, the data in the Working Version Job Objective field is purged. Either you or your rating official must transfer the working version to the Job Objective field prior to approval.</p>

Field	Description
Job Objective	<p>Give a detailed description of the job objective. Job objectives should be specific, measurable, aligned, realistic, and timed (SMART). The character limit for this field is 770.</p> <p> You cannot edit text that your rating official entered in this field; however, if you initially entered the text, the PAA allows you to edit it. In general, to avoid confusion and allow the most editing flexibility, you should enter text into the Working Version Job Objective field. This allows you and your rating official to edit the job objective until it is finalized. Then you or your rating official cuts and pastes the text from the Working Version Job Objectives field into this field.</p> <p> NSPS requires that employees be assigned at least one job objective, and generally three to five.</p>
Contributing Factors	<p>Contributing factors identify the behaviors associated with accomplishment of a job objective.</p> <p> The contributing factors are communication, cooperation and teamwork, critical thinking, customer focus, leadership, resource management, and technical proficiency.</p> <p> Generally you should select no more than three contributing factors for each job objective.</p> <p> The leadership contributing factor must be selected for a supervisory job objective and may be assigned to any employee who is responsible for directing work and developing other employees. It will not be available if your pay band/pay schedule does not allow a leadership contributing factor.</p>
Optional Weight	Weighting job objectives is optional and may only be identified by your rating official.



The remainder of the fields on this page are not used for creating job objectives.

7. Complete the page using one of the following options:

If You...	Then...
Want to cancel the work that has been created so far	Select the Cancel button.
Want to apply what has been done so far and add another job objective	Select the Apply and Add Another button. Repeat step6.
Want to continue to work on the same page or navigate to other functions	Select the Save and Continue button. Go to Step 8.

8. Select the **Apply** button to add all job objectives and go to the *Create Performance Plan: Overview* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Setup Details Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Rating of Record and Comments Interim Reviews Closeout Assessments

Create Performance Plan: Overview

Cancel Save and Continue Transfer to Rating Official Back Step 2 of 3 **Next**

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**

Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**

Pay Pool ID

Placement in Pay Band

Current Base Salary **80979**

Minimum Pay Band Level **74608**

Maximum Pay Band Level **124904**

Setup Details

Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**

Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date

Rating Cycle End Date **30-Sep-2007**

[Return to Top](#)

The **Next** button on the *Create Performance Plan: Overview* page

9. Select the **Next** button to go to the *Create Performance Plan: Review* page.

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Performance Appraisal Application

Home Logout Preferences

Setup Details Overview Review

Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Rating of Record and Comments

Create Performance Plan: Review

Cancel Save and Continue Back Step 3 of 3 Transfer to Rating Official

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS) Pay Plan/Pay Band YA-03
Employee Number 36728

Work Schedule Full-Time Assignment Status Active Appointment
Pay Pool ID

To make changes to the appraisal, click Back.

Setup Details

Appraisal Type Annual Appraisal - NSPS Rating Official McLean, James
Rating Cycle Start Date 01-Oct-2006 Performance Plan Approval Date
Rating Cycle End Date 30-Sep-2007

Relevant Organizational Mission/Strategic Goals Return to Top

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

Employee Self-Assessment Return to Top

Rating of Record and Comments Return to Top

Rating of Record
Rating Official Assessment

Cancel Save and Continue Back Step 3 of 3 Transfer to Rating Official

Home Logout Preferences

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Show and the **Transfer to Rating Official** button on the *Create Performance Plan: Review* page

10. Review information entered on the performance plan. You can review all the information you have entered on the performance plan before submitting it to your rating official for review and edits. To view a job objective, select **Show**. To collapse the job objective, select **Hide**. This function is available throughout the application.

Job Objectives Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Hide Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

Job Objective
Working Version Job Objective In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.

Contributing Factors Technical Proficiency, Critical Thinking, Cooperation and Teamwork,
Last Modified Date 20-Sep-2006

The *Job Objectives* section with an objective expanded after selecting **Show**

11. Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page.


The **Submit** button on the *Share Appraisal Details with Rating Official* page

12. Enter comments to your rating official in the **Notification Message for Rating Official** field. Your message will show up in your rating official's **Notifications** tab.
13. Select the **Submit** button to send the performance plan to your rating official and go to the *My Plans/ Appraisals* page.

The *My Plans/Appraisals* page



The Delete icon for this appraisal is inactive, indicating that the appraisal cannot be deleted (because it has been transferred).



Congratulations!

You have just created the performance plan and entered draft job objectives and contributing factors. It is now transferred to your rating official for his or her review.

Performance Plan: Editing the Plan (Employee)

After the performance plan has been created by either you or your rating official, it may require edits and further input from either you or your rating official. The plan could be routed to you as an empty shell awaiting your input, a final document ready for your review, or a work in progress requiring edits. Your edits can include any of the following:

- Editing draft job objectives created by your rating official
- Creating new job objectives
- Selecting contributing factors for job objectives your created.

After you have finished making edits and have finalized the job objectives, your rating official approves them. This section shows you how to edit your plan and transfer it back and forth between you and your supervisor to finalize it.

Following are the typical steps in the performance plan process. The step covered in this section is bold and italicized:

1. The employee or rating official creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).
2. ***The employee and rating official edit or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your rating official before the plan is finalized.***
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to review and edit your performance plan:

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Performance Appraisal Application

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My Appraisals

Notifications | Appraisals

My Plans/Appraisals

Appraisals of Smith, Jeffery

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Transferred				

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator

Appraisal Effective Date

Appraisal Type

Go Clear

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The **Notifications** tab on the *My Plans/Appraisals* page

1. Select the **Notifications** tab on the *My Plans/ Appraisals* page to retrieve any notifications sent to you by your rating official.

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Performance Appraisal Application

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Notifications | Appraisals

My Information

On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The *Notifications Awaiting Your Attention* page with the notification from the rating official

2. Select the subject of the notification to go to the *Information* page. In this example, the subject is "Your appraisal has been transferred to you".

Update Action on the *Information* page with the rating official's comments

3. Review the comments in the *Rating Official Comments* section.
4. Select Update Action to go to the *Details: Employee* page. The *Details: Employee* page allows you to review the information about the performance plan.



Do not select the **Close** button unless you want to purge the notification. If you purge the notification using the **Close** button, the plan/appraisal can be accessed through the *My Plans/ Appraisals* page by selecting the **Update** button.



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Performance Appraisal Application

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Details: Employee

[Back](#) [Transfer to Rating Official](#) [Update](#)

Employee Name **Jeffery Smith**
Position **01206.BUDGET
ANALYST.73293.DD48.APPR**
Occupational Code **0560.Budget Analyst (NSPS)**
Employee Number **36728**

Organization **CIVILIAN PERSONNEL
MANAGEMENT SERVICE
DD48H50000 01**
Location **Rosslyn, US**

Pay Plan/Pay Band **YA-03**

Work Schedule **Full-Time**
Pay Pool ID

Assignment Status **Active Appointment**

Setup Details

Appraisal Type **Annual Appraisal - NSPS**
Rating Cycle Start Date **01-Oct-2006**
Rating Cycle End Date **30-Sep-2007**

Rating Official **McLean, James**
Performance Plan Approval Date

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Hide	Job Objective 1 - FY06 Funding	PENDING						

Additional Details

Job Objective
Working Version Job Objective **In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.**

Contributing Factors **Technical Proficiency, Critical Thinking, Cooperation and Teamwork,**

Last Modified Date **20-Sep-2006**

Rating of Record and Comments

Rating of Record
Rating official assessment

Employee Self-Assessment

[Back](#) [Transfer to Rating Official](#) [Update](#)

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The **Update** button on the *Details: Employee* page with job objective expanded by selecting Show

5. Review the job objectives and perform one of the following steps:

If You...	Then...
Want to add to or edit the job objectives	Go to step 6.
Are satisfied with the job objectives	Select the Transfer to Rating Official button to go to the <i>Share Appraisal Details with Rating Official</i> page.
	Go to step 12.

6. Select the **Update** button to go to the *Update Performance Plan: Overview* page.

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Performance Appraisal Application

Home Logout Preferences

Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Approvals and Acknowledgements Interim Reviews Closeout Assessments

Update Performance Plan: Overview [Cancel] [Save and Continue] [Transfer to Rating Official] [Continue]

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Work Schedule: Full-Time
 Assignment Status: Active Appointment

Placement in Pay Band
 Current Base Salary: 80979
 Minimum Pay Band Level: 74608
 Maximum Pay Band Level: 124904

Setup Details [Return to Top]
 * Indicates required field
 Appraisal Type: Annual Appraisal - NSPS
 Rating Cycle Start Date: 01-Oct-2006
 Rating Cycle End Date: 30-Sep-2007
 Appraisal Effective Date: 01-Jan-2008
 Rating Official: McLean, James
 Performance Plan Approval Date:


Relevant Organizational Mission/Strategic Goals [Return to Top]
 1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives [Return to Top]
 [Add Objective]

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	PENDING								

The **View Details** icon and **Add Objective** button in the *Job Objectives* section of the *Update Performance Plan: Overview* page

7. Perform one of the following actions:

If You...	Then...
Want to add a new job objective	Select the Add Objective button to go to the <i>Add Objectives</i> page. Go to step 8.
Want to view and edit an existing job objective	Select the View Details pencil icon next to a specific objective to go to the <i>Update Job Objective</i> page and edit the job objective. The <i>Update Job Objective</i> page is identical to the <i>Add Objective</i> page, except that it contains data. Refer to the table associated with step 8 below for a description of each field. Continue with step 9.  You and your rating official should work in the Working Version Job Objective field pending approval of the objective.



Add Job Objective

* Indicates required field

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

[Show Relevant Organizational Mission/Strategic Goals](#)

* Job Objective Title
(Enter up to 80 characters)

* Start Date
(example: 20-Sep-2006)

Job Objective Status

Date Last Modified
Job Objective
(Limit to 770 characters)

[Need Help to Write Objectives](#)

Working Version Job Objective
(Limit to 2000 characters)

- Contributing Factors
- [Technical Proficiency](#)
 - [Critical Thinking](#)
 - [Cooperation and Teamwork](#)
 - [Communication](#)
 - [Customer Focus](#)
 - [Resource Management](#)
 - [Leadership](#)

[Show Additional Information on Contributing Factors](#)

Optional Weight

Job Objective Rating

[Show Job Objective Rating](#)

[Show Performance Indicators](#)

Contributing Factor Impact

[Show Contributing Factor Impact](#)

[Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating

Adjusted Weight






Weighted Rating (If Used)

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Button options on the *Add Job Objective* page

8. Enter or modify the following data:

Field	Description
Job Objective Title	<p>Give a brief description of the job objective. You may enter up to 80 characters.</p> <p>The job objective title must be entered before you can select the Show Relevant Organizational Mission/Strategic Goals link.</p> <p>It is recommended that you use the following format for job objective titles: “Job Objective [#] - [description]”. This will allow your job objectives to be sorted numerically in lists.</p>
Start Date	<p>This field defaults to the current date.</p> <p>Normally it should be the same as the rating cycle start date on the <i>Create Performance Plan: Overview</i> page, but it may be different if a job objective does not become active until a later date due to an anticipated change in your job responsibilities.</p>
Job Objective Status	<p>This field auto-populates identifies whether the job objective has been approved or not. It does not populate until after data has been entered in the Job Objective field.</p>
Date Last Modified	<p>This field displays the last time data was saved in either the Job Objective or Working Version Job Objective field.</p>
Working Version Job Objective	<p>While developing job objectives, you and your rating official should use this section for the draft versions.</p> <p>The maximum limit of characters for this field is 2,000.</p> <p>When the job objective has been approved, the data in the Working Version Job Objective field is purged. Either you or your rating official must transfer the working version to the Job Objective field prior to approval.</p>


Field	Description
Job Objective	<p data-bbox="721 306 1380 445">Give a detailed description of the job objective. Job objectives should be specific, measurable, aligned, realistic, and timed (SMART). The character limit for this field is 770.</p> <p data-bbox="737 487 1380 844">  You cannot edit text that your rating official entered in this field; however, if you initially entered the text, the PAA allows you to edit it. In general, to avoid confusion and allow the most editing flexibility, you should enter text into the Working Version Job Objective field. This allows you and your rating official to edit the job objective until it is finalized. Then you or your rating official cuts and pastes the text from the Working Version Job Objectives field into this field. </p> <p data-bbox="737 865 1380 970">  NSPS requires that employees be assigned at least one job objective, and generally three to five. </p>
Contributing Factors	<p data-bbox="721 1012 1380 1087">Contributing factors identify the behaviors associated with accomplishment of a job objective.</p> <p data-bbox="721 1108 1380 1255">  The contributing factors are communication, cooperation and teamwork, critical thinking, customer focus, leadership, resource management, and technical proficiency. </p> <p data-bbox="721 1285 1380 1360">  Generally you should select no more than three contributing factors for each job objective. </p> <p data-bbox="721 1390 1380 1612">  The leadership contributing factor must be selected for a supervisory job objective and may be assigned to any employee who is responsible for directing work and developing other employees. It will not be available if your pay band/pay schedule does not allow a leadership contributing factor. </p>
Optional Weight	<p data-bbox="721 1654 1380 1730">Weighting job objectives is optional and may only be identified by your rating official.</p>



The remainder of the fields on this page is not used for creating job objectives.

9. Perform one of the following actions:

If You...	Then...
Want to continue to add or edit job objectives	Select the Apply and Add Another button to save what you have entered and return to the <i>Add Job Objective</i> page (or the <i>Update Job Objective</i> page if you are editing). Continue to enter new text and select the Apply and Add Another button until you have finished adding (or editing) job objectives.
Have completed entering or editing job objectives	Select the Apply button to go to the <i>Update Performance Plan: Overview</i> page. Continue with step 10. The status of job objectives will be “pending” until they are approved.



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Overview Review

Setup Details
Relevant Organizational Mission/Strategic Goals
Job Objectives
Employee Self-Assessment
Approvals and Acknowledgements
Interim Reviews
Closeout Assessments

Update Performance Plan: Overview

Cancel
Save and Continue
Transfer to Rating Official
Continue

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	
Work Schedule Full-Time	Assignment Status Active Appointment
Pay Pool ID	

Placement in Pay Band

Current Base Salary	80979
Minimum Pay Band Level	74608
Maximum Pay Band Level	124904

Setup Details [Return to Top](#)

* Indicates required field

Appraisal Type	Annual Appraisal - NSPS	Rating Official	McLean, James
Rating Cycle Start Date	01-Oct-2006	Performance Plan Approval Date	
Rating Cycle End Date	30-Sep-2007		
Appraisal Effective Date	01-Jan-2008		

Relevant Organizational Mission/Strategic Goals [Return to Top](#)

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

[Return to Top](#)

Job Objectives [Return to Top](#)

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	PENDING								
Job Objective 2 - Req Docs	PENDING								

Continue button on the *Update Performance Plan: Overview* page

10. Select the **Continue** button to go to the *Review* page and review your edits.

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Performance Appraisal Application

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Overview Review

Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment

Update Performance Plan: Review

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Position 01206.BUDGET ANALYST.73293.DD48.APPR Location Rosslyn, US
 Occupational Code 0560.Budget Analyst (NSPS) Pay Plan/Pay Band YA-03
 Employee Number 36728

Work Schedule Full-Time Assignment Status Active Appointment
 Pay Pool ID

To make changes to the appraisal, click Back.

Setup Details

Appraisal Type Annual Appraisal - NSPS Rating Official McLean, James
 Rating Cycle Start Date 01-Oct-2006 Performance Plan Approval Date
 Rating Cycle End Date 30-Sep-2007

Relevant Organizational Mission/Strategic Goals [Return to Top](#)

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives [Return to Top](#)

Show All Details | Hide All Details

Details	Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show Job Objective 1 - FY06 Funding		PENDING						
Show Job Objective 2 - Req Docs		PENDING						

Transfer to Rating Official button on the *Update Performance Plan: Review* page

11. Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page and complete the transfer.

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Performance Appraisal Application

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Details: Employee >

Share Appraisal Details with Rating Official

When you click Submit, ownership of this appraisal transfers to the Rating Official.

Notification Message for Rating Official

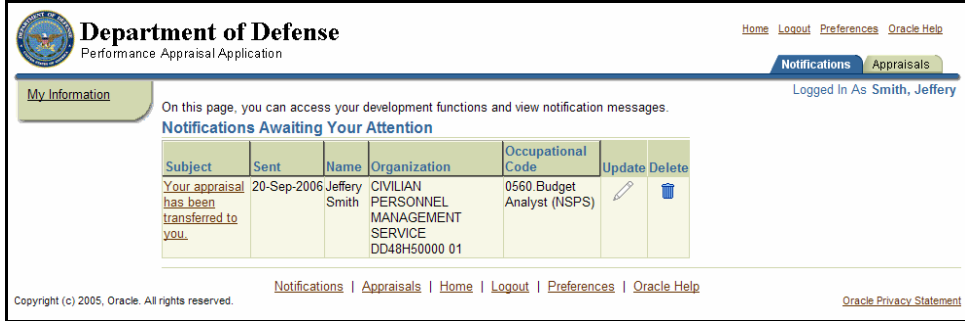
I reviewed the plan and added an objective. I agree with the job objective you created.

Submit

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Comments entered for the rating official and the **Submit** button on the *Share Appraisal Details with Rating Official* page

12. Enter comments regarding the performance plan in the **Notification Message for Rating Official** field.
13. Select the **Submit** button to transfer the performance plan to the rating official and return to the *Notifications Awaiting Your Attention* page.



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Notifications Appraisals

Logged In As Smith, Jeffery

My Information

On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The *Notifications Awaiting Your Attention* page

Congratulations!

You have successfully edited and reviewed your performance plan. The performance plan has been transferred back to your rating official for further edits or approval.

Performance Plan: Acknowledging the Plan

After your rating official has finalized your performance plan, he or she transfers the plan to you. You acknowledge that the performance plan been communicated to you and transfer ownership of the plan back to your rating official so that he or she can approve it.

Acknowledging that the performance plan was communicated to you does not mean that you agree with it; you are merely acknowledging that it was communicated to you by your supervisor. You are encouraged to engage in dialogue with your supervisor and HR practitioners, if necessary, before you reach the acknowledgement stage to try to resolve any disagreements and determine job objectives, contributing factors, and optional weights that are acceptable to both you and your supervisor.

The performance plan must be approved within 30 days from the start of the rating cycle, entrance on duty, or job change, unless an extension is granted.

As described earlier, the typical steps in the performance plan process are as follows. The step covered in this section is bold and italicized:

1. The employee or rating official creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).
2. The employee and rating official edit and/or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your rating official before the plan is finalized.
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. ***The employee reviews the performance plan and acknowledges that it was communicated to him or her.***
5. The rating official approves the performance plan.

Follow these steps to acknowledge communication of your performance plan:

The **Notifications** tab on the *My Plans/Appraisals* page

1. Select the **Notifications** tab on the *My Plans/ Appraisals* page to retrieve any notifications sent to you by your rating official.

The *Notifications Awaiting Your Attention* page

2. Select Your appraisal has been transferred to you to go to the *Information* page.

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Information
 This notification does not require a response.
Your appraisal has been transferred to you. [Close](#)

From: McLean, James
 To: Smith, Jeffery
 Sent: 20-Sep-2006 13:16:03
 ID: 127714

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Rating Official Comments
 I approved my objective and the objective you provided. Please acknowledge the performance plan.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Related Applications
[Update Action](#) [Close](#)

[Return to Worklist](#) [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

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Update Action on the *Information* page with rating official comments

3. Review the comments in the *Rating Official Comments* section.
4. Select Update Action to go to the *Details: Employee* page. The *Details: Employee* page allows you to review the information about the performance plan.

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Details: Employee [Back](#) [Transfer to Rating Official](#) [Update](#)

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Setup Details

Appraisal Type	Annual Appraisal - NSPS	Rating Official	McLean, James
Rating Cycle Start Date	01-Oct-2006	Performance Plan Approval Date	
Rating Cycle End Date	30-Sep-2007		

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.


Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Update button on the *Details: Employee* page

5. Select the **Update** button to go to the *Update Performance Plan: Overview* page.



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Overview
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[Approvals and Acknowledgements](#)

[Interim Reviews](#)

[Closeout Assessments](#)

Update Performance Plan: Overview

Cancel
Save and Continue
Transfer to Rating Official
Continue

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	
Work Schedule Full-Time	Assignment Status Active Appointment
Pay Pool ID	

Placement in Pay Band

Current Base Salary	80979
Minimum Pay Band Level	74608
Maximum Pay Band Level	124904

Setup Details

* Indicates required field

Appraisal Type	Annual Appraisal - NSPS	Rating Official	McLean, James
Rating Cycle Start Date	01-Oct-2006	Performance Plan Approval Date	
Rating Cycle End Date	30-Sep-2007		
Appraisal Effective Date	01-Jan-2008		

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Add Objective	Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
	Job Objective 1 - FY06 Funding	APPROVED	View Details							🗑️
	Job Objective 2 - Req Docs	APPROVED	View Details							🗑️

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan		Acknowledge				

Interim Reviews

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Closeout Assessments

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Cancel
Save and Continue
Transfer to Rating Official
Continue


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The **View Details** and **Acknowledge** buttons on the *Update Performance Plan: Overview* page

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Version 1.0 – October 2006

6. Perform one of the following steps:

If You...	Then...
Want to review a job objective	Select the View Details pencil icon in the <i>Job Objectives</i> section. Refer to the <i>Performance Plan: Editing the Plan (Employee)</i> section for how to proceed.
Are satisfied with the job objectives	Select the Acknowledge button to go to the <i>Update Performance Plan: Overview</i> page. Go to step 7.  After you select the Acknowledge button to indicate your acknowledgement of the plan, it becomes unavailable to you. The Emp Ack Date field is auto-populated with the system date.
Do not agree with the job objectives	Select the Transfer to Rating Official button to return the plan to your rating official with comments. Continue with step 8.

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Home Logout Preferences

Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Approvals and Acknowledgements Interim Reviews Closeout Assessments

Update Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**

Pay Pool ID

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

Setup Details [Return to Top](#)

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**

Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date

Rating Cycle End Date **30-Sep-2007**

Appraisal Effective Date **01-Jan-2008**

Job Objectives [Return to Top](#)

[Add Objective](#)

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	APPROVED								
Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment [Return to Top](#)

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements [Return to Top](#)

Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan		Acknowledge	30-Sep-2006			

Interim Reviews [Return to Top](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Closeout Assessments [Return to Top](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Cancel Save and Continue Transfer to Rating Official **Continue**

Home | Logout | Preferences

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The **Continue** button and grayed-out **Acknowledge** button on the *Update Performance Plan: Overview* page

7. Select the **Continue** button to go to the *Update Performance Plan: Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Overview **Review**

Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment

Update Performance Plan: Review

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Work Schedule: Full-Time
 Pay Pool ID: [blank]
 Assignment Status: Active Appointment

To make changes to the appraisal, click Back.

Setup Details

Appraisal Type: Annual Appraisal - NSPS
 Rating Cycle Start Date: 01-Oct-2006
 Rating Cycle End Date: 30-Sep-2007
 Rating Official: McLean, James
 Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Details	Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	APPROVED						
Show Job Objective 2 - Req Docs	Job Objective 2 - Req Docs	APPROVED						

The *Update Performance Plan: Review* page

- Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Appraisals: My Appraisals >

Share Appraisal Details with Rating Official

When you click Submit, ownership of this appraisal transfers to the Rating Official.


Notification Message for Rating Official

I have acknowledged the performance plan. It is ready for your approval.

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The **Submit** button and notification comments on the *Share Appraisal Details with Rating Official* page

- Enter comments regarding your rating official in the *Notification Message for Rating Official* section.
- Select the **Submit** button to transfer the performance plan to your rating official and return to the *My Plans/ Appraisals* page.




Department of Defense
 Performance Appraisal Application

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[Notifications](#) | [Appraisals](#)

My Appraisals


Confirmation

The appraisal has been submitted to the rating official.

My Plans/Appraisals

Appraisals of Smith, Jeffery

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Ongoing				

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator

Appraisal Effective Date

Appraisal Type

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

[Notifications](#) | [Appraisals](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

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The My Plans/Appraisals page

Congratulations!

You have just acknowledged that your performance plan was communicated to you. The performance plan has been transferred back to your rating official for approval.

Interim Review: Providing a Self-Assessment

An interim review can be done at any time during the rating cycle but must occur at least once. The system allows multiple interim reviews. The timing and number of interim reviews (greater than one) is at your Component's or organization's discretion.

If only one interim review is conducted, it should be done at the mid-term of the cycle.

In preparation for an interim review, you are encouraged to complete a self-assessment to help judge your progress. Self-assessments are optional; however, they help both you and your rating official remember what you have done, so it is in your own best interest to complete a self-assessment.

The typical steps in the interim review process are as follows. The step covered in this section is in bold and italicized:

1. The rating official creates the interim review record and transfers responsibility to the employee to write a self-assessment.
- 2. *The employee provides a self-assessment.***
3. The rating official reviews the self-assessment and provides an interim assessment of the employee.
4. The employee reviews the rating official's assessment and acknowledges it.
5. The rating official approves the interim review.

Follow these steps to provide your self-assessment for the interim review:

The screenshot shows the Department of Defense Performance Appraisal Application interface. At the top, there is a navigation bar with links for Home, Logout, Preferences, and Oracle Help. Below this, there are tabs for Notifications and Appraisals. The main content area is titled 'My Appraisals' and 'My Plans/Appraisals'. Under 'My Plans/Appraisals', there is a section for 'Appraisals of Smith, Jeffery' with a table listing appraisals. Below this is a section for 'Completed Plans/Appraisals' with a search form. The search form includes fields for Initiator (Last Name, Title, First Name), Appraisal Effective Date, and Appraisal Type, along with 'Go' and 'Clear' buttons. At the bottom, there is a footer with copyright information and a link to the Oracle Privacy Statement.

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Transferred				

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

The **Notifications** tab on the *My Plans/Appraisals* page

1. Select the **Notifications** tab on the *My Plans/ Appraisals* page to retrieve any notifications sent to you by your rating official.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

Logged In As Smith, Jeffery

My Information

On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

Copyright (c) 2005, Oracle. All rights reserved. Notifications | Appraisals | Home | Logout | Preferences | Oracle Help Oracle Privacy Statement

The *Notifications Awaiting Your Attention* page

2. Select Your Appraisal has been transferred to you to go to the *Information* page.

Department of Defense

Home | Logout | Preferences | Oracle Help

Information

This notification does not require a response.

Your appraisal has been transferred to you. Close

From: McLean, James
To: Smith, Jeffery
Sent: 20-Sep-2006 15:41:30
ID: 127716

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Rating Official Comments

I have created an interim review. Please provide your self-assessment for it.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Related Applications


[Update Action](#)

[Return to Worklist](#) Close

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Update Action and the rating official comments on the *Information* page

3. Select Update Action to go to the *Details: Employee* page.



Department of Defense

Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#)

Details: Employee
[Back](#) | [Transfer to Rating Official](#) | [Update](#)

Employee Name **Jeffery Smith**

Position **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code **0560.Budget Analyst (NSPS)**

Employee Number **36728**

Work Schedule **Full-Time**

Pay Pool ID

Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**

Location **DD48H50000 01 Rosslyn, US**

Pay Plan/Pay Band **YA-03**

Assignment Status **Active Appointment**

Setup Details

Appraisal Type **Annual Appraisal - NSPS**

Rating Cycle Start Date **01-Oct-2006**

Rating Cycle End Date **30-Sep-2007**

Rating Official **McLean, James**

Performance Plan Approval Date **20-Sep-2006**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Rating of Record and Comments

Rating of Record
Rating official assessment

Employee Self-Assessment

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[Home](#) | [Logout](#) | [Preferences](#)

[Back](#) | [Transfer to Rating Official](#) | [Update](#)

[Oracle Privacy Statement](#)

The **Update** button on *Details: Employee* page

4. Select the **Update** button to go the *Update Performance Plan Overview* page.



Department of Defense

Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

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Employee Self-Assessment
Approvals and Acknowledgements
Interim Reviews
Closeout Assessments

Update Performance Plan: Overview

Cancel
Save and Continue
Transfer to Rating Official
Continue

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	
Work Schedule Full-Time	Assignment Status Active Appointment
Pay Pool ID	

Placement in Pay Band

Current Base Salary 80979
Minimum Pay Band Level 74608
Maximum Pay Band Level 124904

Setup Details

* Indicates required field

Appraisal Type Annual Appraisal - NSPS	Rating Official McLean, James
Rating Cycle Start Date 01-Oct-2006	Performance Plan Approval Date 20-Sep-2006
Rating Cycle End Date 30-Sep-2007	
Appraisal Effective Date 01-Jan-2008	

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	APPROVED								
Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	20-Sep-2006	Acknowledge	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	

The **Update** icon on *Update Performance Plan: Overview* page

5. Select the **Update** icon to open the *Interim Reviews* section.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Approvals and Acknowledgements Interim Reviews Closeout Assessments

Update Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**
Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**

Relevant Organizational Mission/Strategic Goals [Return to Top](#)

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

[Return to Top](#)

Job Objectives [Return to Top](#)

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	APPROVED								
Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment [Return to Top](#)

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements [Return to Top](#)

Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	20-Sep-2006	<input type="button" value="Acknowledge"/>	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews [Return to Top](#)

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	

Update Interim Review

TIP Self-assessment is voluntary but highly recommended. The self-assessment better informs the supervisor of employee major accomplishments throughout the period/year.

Interim Review Start Date **01-Oct-2006** Interim Review Initiator **McLean, James**
Interim Review End Date **01-Mar-2007** Interim Review Status **PENDING**
Interim Review Approved Date
Employee Acknowledge
Communication Method Acknowledge
Other Communication Method
Emp Acknowledged Date

Rating Official Assessment for Interim Review

Employee Self-Assessment for Interim Review

The **Transfer to Rating Official** button, the **Save** button, and the self-assessment entered on the *Update Performance Plan: Overview* page

6. Enter your self-assessment in the **Employee Self-Assessment for Interim Review** field.
7. Select the **Save** button to save your self-assessment. You remain on the same page.
8. Select the **Transfer to Rating Official** button to enter a notification comment to your rating official on the *Share Appraisals with Rating Official* page.

Notification Message for Rating Official field on the *Share Appraisal Details with Rating Official* page

9. Enter a message to your rating official in the **Notification Message for Rating Official** field.
10. Select the **Submit** button to transfer the interim review back to your rating official and return to the *My Plans/ Appraisals* page.

The *My Plans/Appraisals* page

Congratulations!

You have just provided your self-assessment for the interim review. The interim review has been transferred back to your rating official for review and for his or her assessment of your performance.

Interim Review: Acknowledging the Interim Review

After your rating official receives your self-assessment, he or she enters the assessment of your performance in the interim review record and transfers it back to you for your review and acknowledgement.

As described earlier, the typical steps in the interim review process are as follows. The step covered in this section is bold and italicized.

1. The rating official creates the interim review record and transfers responsibility to the employee to write a self-assessment.
2. The employee provides a self-assessment.
3. The rating official reviews the self-assessment and provides an interim assessment of the employee.
4. ***The employee reviews the rating official's assessment and acknowledges it.***
5. The rating official approves the interim review.

Follow these steps to review and acknowledge the interim review:

Department of Defense
Performance Appraisal Application

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Notifications | Appraisals

My Appraisals

My Plans/Appraisals

Appraisals of Smith, Jeffery

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
McLean, James	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Transferred				

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator:

Appraisal Effective Date: (example: 20-Sep-2006)

Appraisal Type:

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The **Notifications** tab on the *My Plans/Appraisals* page

1. Select the **Notifications** tab on the *My Plans/Appraisals* page to retrieve any notifications sent to you by your rating official.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

Logged In As Smith, Jeffery

My Information

On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560.Budget Analyst (NSPS)		

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The *Notifications Awaiting Your Attention* page

2. Select Your Appraisal has been transferred to you to go to the *Information* page.

Department of Defense

Home | Logout | Preferences | Oracle Help

Information

This notification does not require a response.

Your appraisal has been transferred to you. Close

From: McLean, James
To: Smith, Jeffery
Sent: 20-Sep-2006 17:35:59
ID: 127718

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Rating Official Comments

I read your self-assessment and provided my assessment for the interim review. Please acknowledge.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Related Applications

[Update Action](#)

[Return to Worklist](#) Close

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Update Action and the rating official's comments on the *Information* page

3. Read your rating official's comments and then select Update Action to go to the *Details: Employee* page.

Department of Defense
Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

Details: Employee

[Transfer to Rating Official](#) **Update**

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Roslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule Full-Time		Assignment Status Active Appointment	
Pay Pool ID			

Setup Details


Appraisal Type	Annual Appraisal - NSPS	Rating Official	McLean, James
Rating Cycle Start Date	01-Oct-2006	Performance Plan Approval Date	20-Sep-2006
Rating Cycle End Date	30-Sep-2007		

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

The **Update** button on *Details: Employee* page

4. Select the **Update** button to go to the *Update Performance Plan Overview* page.



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Update Performance Plan: Overview

Cancel Save and Continue Transfer to Rating Official Continue

Employee Name **Jeffery Smith**

Position **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code **0560.Budget Analyst (NSPS)**

Employee Number **36728**

Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Location **Rosslyn, US**

Pay Plan/Pay Band **YA-03**

Work Schedule **Full-Time**

Assignment Status **Active Appointment**

Placement in Pay Band

Current Base Salary **80979**

Minimum Pay Band Level **74608**

Maximum Pay Band Level **124904**

Setup Details

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS**

Rating Official **McLean, James**

Rating Cycle Start Date **01-Oct-2006**

Performance Plan Approval Date **20-Sep-2006**

Rating Cycle End Date **30-Sep-2007**

Appraisal Effective Date **01-Jan-2008**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Add Objective

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	APPROVED								
Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements


Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	20-Sep-2006		20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	

The **Update** icon on *Update Performance Plan: Overview* page

5. Select the **Update** pencil icon for the interim review.



Department of Defense

Performance Appraisal Application

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Interim Reviews
Closeout Assessments

Update Performance Plan: Overview

Employee Name **Jeffery Smith**
Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Position **01206.BUDGET ANALYST.73293.DD48.APPR**
Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)**
Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time**
Assignment Status **Active Appointment**

Pay Pool ID

Placement in Pay Band

Current Base Salary **80979**

Minimum Pay Band Level **74608**

Maximum Pay Band Level **124904**

Setup Details

* Indicates required field [Return to Top](#)

Appraisal Type **Annual Appraisal - NSPS**
Rating Official **McLean, James**

Rating Cycle Start Date **01-Oct-2006**
Performance Plan Approval Date **20-Sep-2006**

Rating Cycle End Date **30-Sep-2007**

Appraisal Effective Date **01-Jan-2008**

Relevant Organizational Mission/Strategic Goals

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1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

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Job Objectives

[Return to Top](#)

Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Job Objective 1 - FY06 Funding	APPROVED								
Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment [Return to Top](#)

Approvals and Acknowledgements

[Return to Top](#)

Item	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	20-Sep-2006	<input checked="" type="checkbox"/> Acknowledge	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Return to Top](#)

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	

Update Interim Review

TIP Self-assessment is voluntary but highly recommended. The self-assessment better informs the supervisor of employee major accomplishments throughout the period/year.

Interim Review Start Date **01-Oct-2006**

Interim Review End Date **01-Mar-2007**

Communication Date

Other Communication Method

Interim Review Initiator **McLean, James**

Interim Review Status **PENDING**

Interim Review Approved Date

Employee Acknowledgement Acknowledge

Emp Acknowledged Date

Rating Official Assessment for Interim Review

Jeffery is accomplishing his objectives. He provides accurate budget data to program staff. His reports are good at "telling a story" as it relates to his programs. They are concise and timely.

Employee Self-Assessment for Interim Review

I have produced very accurate budget forecasts for my program areas. I worked well with program subject matter experts to understand their needs and prepare reasonable budgets that get approved. I have provided quality budget support to my customers as indicated by my customer service ratings. Customer service ratings have been 4.6 and above on both technical and interpersonal skill/support

The **Acknowledge** check box and the **Save** button in the *Update Interim Review* section

6. Review your rating official's assessment.

7. Select the **Acknowledge** check box to confirm that the interim review has been communicated to you.
8. Select the **Save** button to save your acknowledgement. You remain on the *Update Performance Plan: Overview* page.
9. Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences

Share Appraisal Details with Rating Official
When you click Submit, ownership of this appraisal transfers to the Rating Official. Cancel Submit

Notification Message for Rating Official

I acknowledged the interim review. You can now approve it.

Cancel Submit

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The *Share Appraisal Details with Rating Official* page

10. Enter a message to your rating official in the **Notification Message for Rating Official** field.
11. Select the **Submit** button to transfer the performance plan back to your rating official. The system returns to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

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Notifications | Appraisals

Logged In As Smith, Jeffery

My Information On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

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The *Notifications Awaiting Your Attention* page

Congratulations!

You have just acknowledged the interim review. The interim review has been transferred back to your rating official for approval.



Closeout Assessments (Employees)

Closeout assessments will be included in future versions of this guide.

Annual Appraisal: Providing a Self-Assessment

Employees are encouraged to complete self-assessments during the interim review and end-of-year review. While NSPS does not require self-assessments, they may be mandated by your organization or Component.

The self-assessment conducted as part of the end-of-cycle review is an opportunity for you to provide input to your rating official about what you have accomplished during the year. Your self-assessment should be completed in time to allow him or her to consider your input as part of the appraisal process.

The typical steps in the annual appraisal process are as follows. Steps 1-3 are similar to those performed for interim reviews. The step covered in this section is bold and italicized.

1. The rating official transfers responsibility to the employee to provide a self-assessment.
- 2. *The employee provides his or her self-assessment (optional).***
3. The rating official reviews the self-assessment (if applicable).
4. The rating official submits his or her assessment and recommended rating for higher-level review and approval.
5. The pay pool panel reviews and approves the appraisal (using an application outside of PAA). During the pay pool panel's appraisal reconciliation process, the panel may ask the rating official to modify his or her rating of the employee.
6. The rating official changes his or her rating of the employee, if necessary (in PAA).
7. The rating official indicates that the appraisal was communicated to the employee.
8. The employee acknowledges that the appraisal was communicated to him or her.

Follow these steps to provide a self-assessment for an end-of-cycle review:

The **Notifications** tab on the *My Plans/Appraisals* page

1. Select the **Notifications** tab on the *My Plans/ Appraisals* page to retrieve any notifications sent to you by your rating official.

The *Notifications Awaiting Your Attention* page

2. Select Your Appraisal has been transferred to you to go to the *Information* page.

The screenshot displays the 'Department of Defense' Information page. At the top, there is a navigation bar with links for Home, Logout, Preferences, and Oracle Help. Below this, a green banner indicates that the notification does not require a response. The main heading is 'Your appraisal has been transferred to you.' with a 'Close' button. The email header shows it is from McLean, James to Smith, Jeffery, dated 20-Sep-2006. A 'Summary' section lists employee details for Jeffery Smith, including his position as a Budget Analyst (NSPS) and his organization, the Civilian Personnel Management Service. The 'Rating Official Comments' section contains the instruction: 'Please provide a self-assessment for your end-of-cycle review.' Below this, the 'Appraisal Details' section provides dates for the rating cycle and appraisal type. The 'Related Applications' section features an 'Update Action' button. At the bottom, there are links for 'Return to Worklist', 'Home | Logout | Preferences | Oracle Help', and 'Oracle Privacy Statement'.

Department of Defense

Home Logout Preferences Oracle Help

Information

This notification does not require a response.

Your appraisal has been transferred to you. Close

From McLean, James
To Smith, Jeffery
Sent 20-Sep-2006 18:57:52
ID 127720

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Rating Official Comments

Please provide a self-assessment for your end-of-cycle review.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Related Applications

Update Action


[Return to Worklist](#) Close

Home | Logout | Preferences | Oracle Help

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Update Action and rating official's comments on the *Information* page

3. Review the comments from your rating official in the *Rating Official Comments* section.
4. Select Update Action to go to the *Details: Employee* page and continue with your self-assessment.



Department of Defense

Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#)

Details: Employee

[Back](#)
[Transfer to Rating Official](#)
[Update](#)

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	
Work Schedule Full-Time	Assignment Status Active Appointment
Pay Pool ID	

Setup Details

Appraisal Type Annual Appraisal - NSPS	Rating Official McLean, James
Rating Cycle Start Date 01-Oct-2006	Performance Plan Approval Date 20-Sep-2006
Rating Cycle End Date 30-Sep-2007	

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Rating of Record and Comments

Rating of Record
Rating official assessment

Employee Self-Assessment

[Back](#)
[Transfer to Rating Official](#)
[Update](#)

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[Home](#) | [Logout](#) | [Preferences](#)
[Oracle Privacy Statement](#)

The **Update** button on the *Details: Employee* page

5. Select the **Update** button to go to the *Update Performance Plan: Overview* page.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

Overview **Review**

[Setup Details](#)
[Relevant Organizational Mission/Strategic Goals](#)
[Job Objectives](#)
[Employee Self-Assessment](#)
[Approvals and Acknowledgements](#)
[Interim Reviews](#)
[Closeout Assessments](#)

Update Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **DD48H50000 01**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Placement in Pay Band

Current Base Salary **80979**
 Minimum Pay Band Level **74608**
 Maximum Pay Band Level **124904**

Setup Details [Return to Top](#)

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**
 Rating Cycle End Date **30-Sep-2007**
 Appraisal Effective Date **01-Jan-2008**

Job Objectives [Return to Top](#)

<input type="button" value="Add Objective"/>										
Job Objective Title	Status	View Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete	
Job Objective 1 - FY06 Funding	APPROVED									
Job Objective 2 - Req Docs	APPROVED									

Employee Self-Assessment [Return to Top](#)

TIP Provide input that you wish to have considered as part of your performance rating assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

The **Save and Continue** button and **Employee Self-Assessment** field on the *Update Performance Plan: Overview* page

6. Enter your self-assessment in the **Employee Self-Assessment** field.
7. Select the **Save and Continue** button to save your self-assessment. You remain on the same page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Overview Review

Confirmation
Your changes have been saved. You can continue to work on the appraisal or navigate to other functions.

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Approvals and Acknowledgements Interim Reviews Closeout Assessments

Update Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**
 Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Placement in Pay Band
 Current Base Salary **80979**
 Minimum Pay Band Level **74608**
 Maximum Pay Band Level **124904**

Setup Details [Return to Top](#)
 * Indicates required field
 Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**
 Rating Cycle End Date **30-Sep-2007**
 Appraisal Effective Date **01-Jan-2008**

Buttons: Cancel Save and Continue **Transfer to Rating Official** Continue

The **Transfer to Rating Official** button on the *Update Performance Plan:Overview* screen

8. Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Share Appraisal Details with Rating Official
When you click Submit, ownership of this appraisal transfers to the Rating Official.

Notification Message for Rating Official

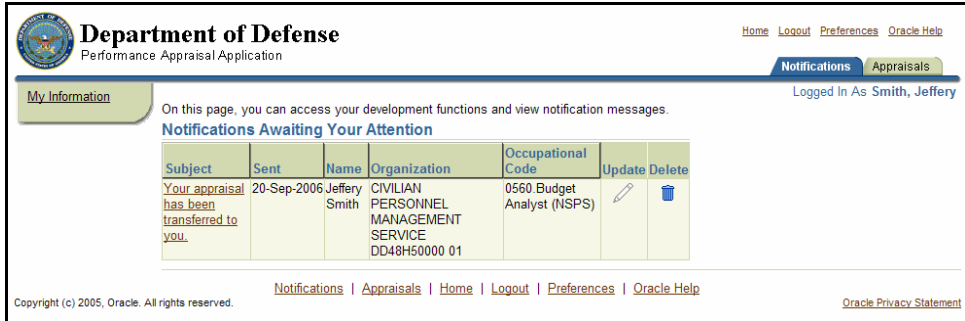
I have provided my self-assessment. Please take it into consideration for my end-of-cycle review.


Buttons: Cancel Submit

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Notification message on the *Share Appraisal Details with Rating Official* page

9. Enter a message to your rating official in the **Notification Message for Rating Official** field.
10. Select the **Submit** button to transfer the performance plan back to your rating official. The system returns to the *Notifications Awaiting Your Attention* page.




Department of Defense
 Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)



[Notifications](#) | [Appraisals](#)

Logged In As **Smith, Jeffery**

My Information

On this page, you can access your development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

[Notifications](#) | [Appraisals](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

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The *Notifications Awaiting Your Attention* page

Congratulations!

You have just completed your annual appraisal self-assessment. The annual appraisal has been transferred to your rating official for review.



Annual Appraisal: Acknowledging the Annual Appraisal

This procedure will be included in future versions of this guide.



Closing a Notification (Employees)

Once an appraisal has been transferred from your rating official to you, it appears as a notification in your *Notifications Awaiting Your Attention* page. The notifications remain in the list of notifications until you close them, which purges them from the system. The notifications do not automatically disappear from the list once you have opened them. This is similar to the way emails work in many email applications.

If you purge the notification, the appraisal can be accessed through the *My Plans/ Appraisals* page.



The notification message from your rating official will be purged along with the notification. Ensure that you have opened the notification and read the notification message before you purge it.

You can close a notification by doing the following:

The screenshot shows the 'Department of Defense Performance Appraisal Application' interface. The page title is 'Department of Defense Performance Appraisal Application'. The user is logged in as 'Smith, Jeffery'. The page contains a 'My Information' tab and a 'Notifications Awaiting Your Attention' section. The notification list is as follows:

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

At the bottom of the page, there is a copyright notice: 'Copyright (c) 2005, Oracle. All rights reserved.' and a link to the 'Oracle Privacy Statement'.

Notifications on the *Notifications Awaiting Your Attention* page

1. Select Your appraisal has been transferred to you to go to the *Information* page.

Department of Defense

Home Logout Preferences Oracle Help

Information

This notification does not require a response.

Your appraisal has been transferred to you. Close

From: McLean, James
 To: Smith, Jeffery
 Sent: 20-Sep-2006 18:57:52
 ID: 127720

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		

Rating Official Comments

Please provide a self-assessment for your end-of-cycle review.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Close button on the *Information* page

2. Select the **Close** button to purge the notification from your notifications list and return to the *Notifications Awaiting Your Attention* page.

As described in the warning message above, the notification comment from your rating official in the *Rating Official Comments* section is no longer available once you close the notification.

3.

Department of Defense

Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Awaiting Your Attention

On this page, you can access your development functions and view notification messages.

Subject Sent Name Organization Occupational Code Update Delete

No data exists.

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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Notifications Awaiting Your Attention page with notification purged

Congratulations!

You have just closed a notification.

In future versions of the PAA, you will be able to close a notification on the *Notifications Awaiting Your Attention* page by selecting the **Delete** icon.

Performance Appraisal Application (PAA) Procedures for Rating Officials

This section focuses on your use of the system as a rating official and details how to use the PAA to initiate, enter, edit, and approve the performance plans of employees. It describes how to use the PAA to complete the appraisal process, including creating and finalizing your employees' performance plans and completing interim and annual performance reviews.

Transfers and information-sharing form an important component to the activities covered in this guide. The following list outlines the sequence of tasks your employee and you perform when using the PAA during the performance management cycle. The bold, italicized tasks are rating official tasks and are covered in this section.

Performance Plan (Plan Phase)

1. The rating official or employee creates the performance plan.
2. The rating official and employee edit the performance plan until it is finalized.
- 3. *The rating official approves the job objectives.***
4. The employee acknowledges the performance plan.
- 5. *The rating official approves the performance plan.***

Interim Review (Monitor Phase)

- 6. *The rating official creates the interim review.***
7. The employee provides an interim review self-assessment (optional).
- 8. *The rating official enters the assessment for the interim review.***
9. The employee acknowledges the interim review.
- 10. *The rating official approves the interim review.***

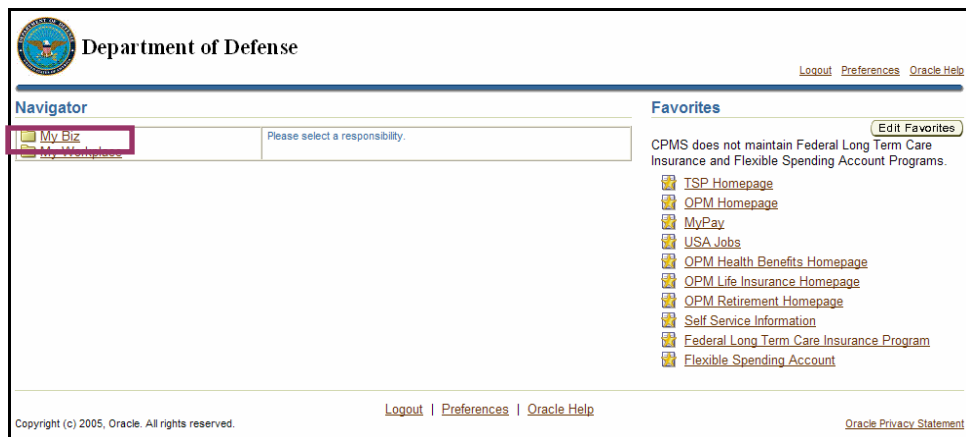
Annual Appraisal (Rate Phase)

- 11. *The rating official transfers the appraisal to the employee to provide a self-assessment and may conduct a conversation with the employee as part of an end-of-cycle review.***
12. The employee provides a self-assessment (optional).
- 13. *The rating official reviews the employee's self-assessment (if applicable).***
- 14. *The rating official submits his or her assessment and recommended rating for higher-level review and approval.***
- 15. *The pay pool panel reviews and approves the appraisal (using another online application outside the PAA).***
- 16. *The rating official changes his or her rating of the employee, if necessary (in the PAA).***

17. *The rating official indicates that the appraisal was communicated to the employee.*

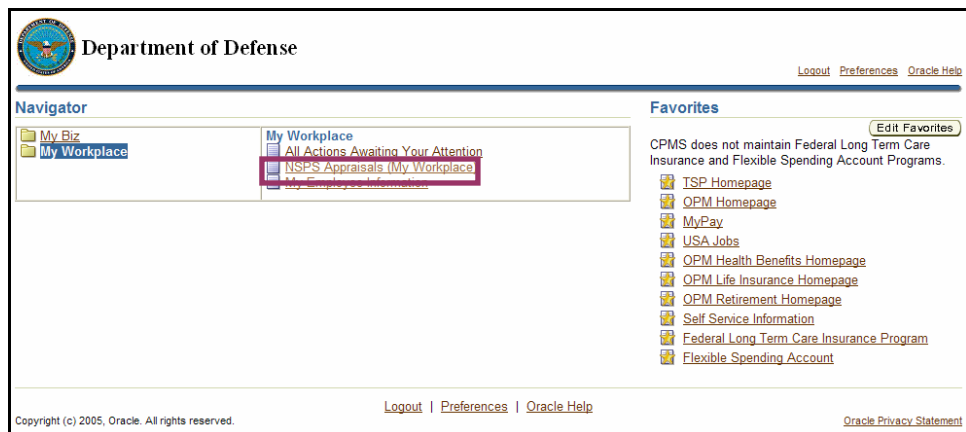
18. The employee acknowledges that the appraisal was communicated to him or her.

Before you can perform any tasks, you must access the PAA, as you learned in the *Performance Appraisal Application Procedures for Employees* section. For instructions on how to do this, follow the first four steps described in the *Performance Appraisal Application Procedures for Employees —Logging on to the Performance Appraisal Application* section. Then do the following:



My Workplace on the *Navigator* page

1. Select My Workplace to retrieve the list of activities available to you.



My Workplace → NSPS Appraisals (My Workplace) on the *Navigator* page

2. Select NSPS Appraisals (My Workplace) to go to the *Performance Management as Rating Official* page, the main page for rating officials, as described in the next section.

Congratulations!

You have successfully logged on to the PAA.

For more information on how to access and log on to My Biz or My Workplace, visit your Component home page or <http://www.cpms.osd.mil/regmod/selfservice/>

All procedures that follow presume that you are already logged on to the PAA.

Main Page for Rating Officials: *Performance Management As Rating Official*

The access procedure described in the previous section takes you to the main PAA page for rating officials. The main page contains items described in the following sections.

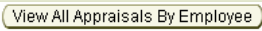

Main page for rating officials (*Performance Management As Rating Official*)




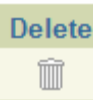


Navigation tabs

- The **Notifications** tab alerts you when something has been routed to you.
- The **Appraisals** tab is the main (default) page. It allows you to initiate a new appraisal, view or update an in-progress appraisal, or search for historical appraisals.

Plans/Appraisals in Progress Section

This section contains the appraisals that have been created for your employees. You can interact with the appraisals using the following icons:

Icon	Description
	Selecting the View All Appraisals by Employee button allows you to view both in-progress and completed appraisals for each of your employees.
	Selecting the Details icon displays a different set of read-only information, depending on the screen on which it is located. You can view the appraisal for information only up to the last sharing point.

Icon	Description
	<p>The highlighted pencil under the Appraise column indicates that you have ownership of the appraisal.</p>
	<p>The grayed-out pencil under the Appraise column indicates that the employee has ownership of the appraisal.</p>
	<p>The highlighted trash can under the Delete column indicates that the appraisal can be permanently removed from the system.</p>
	<p>The grayed-out trash can under the Delete column indicates that the appraisal cannot be removed from the system.</p>
	<p>Selecting the Close icon deactivates the appraisal and removes it from your Plans/Appraisals in Progress list. It does not permanently delete it from the system. Select this button to close an appraisal for an employee who has left employment or changed positions before the end of the performance cycle, making his or her current appraisal record obsolete (necessitating a closeout assessment).</p>
	<p>Selecting the Print icon allows you to print the form with completed information. At this time, only the performance plan will be printed and only approved job objectives will appear on the form.</p>

Completed Plans/Appraisals Section

This section allows you to search for appraisals you have completed for your employees. You can specify filter values, such as appraisal type and employee, to locate particular completed appraisals in the list.

Performance Plan: Creating the Plan (Rating Official)

Shortly after the beginning of the rating cycle (normally October 1), you or your employee initiate a new performance plan in the PAA. This is done for each employee you are responsible for rating. A new performance plan may have to be created in the middle of the cycle if a new employee is hired.

There are two approaches to creating a performance plan:

- Notify your employee that you would like him or her to create the plan, and have the employee create it.
- Create the plan yourself.

In either case, you should communicate with your employee about which option you choose, and what you expect if your employee is to create it. This is particularly important to avoid rework if your employee creates the plan and enters data that is incorrect or not what you expect. Also, your employee may not know certain information and may need to get it in advance from you (for instance, the rating cycle start date). If you ask your employee to create the plan and enter objectives, you must ensure that he or she knows the relevant organizational mission/strategic goals (that field is blank until you or your employee enters the data).

Regardless of who initiates the performance plan, it can be left as an empty shell, in which the other party enters the objectives, or the person creating it can enter initial objectives. After the performance plan has been initiated, you and your employee can enter, edit, or review objectives as much as needed before the final transfer from the employee to you for approval.

The typical steps in creating the performance plan process are as follows. The step covered in this section is bold and italicized:

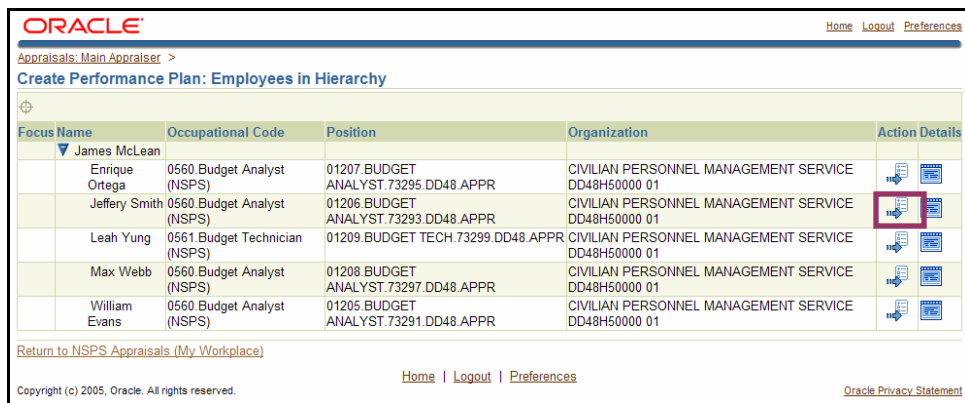
- 1. The rating official or employee creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).***
2. The rating official and employee edit or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your employee before the plan is finalized.
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to create a performance plan:



The **Go** button on the *Performance Management As Rating Official* page

1. Select the **Go** button from the *Performance Management As Rating Official* page, next to the Create the Performance Plan drop-down menu, to go to the *Create Performance Plan: Employees in Hierarchy* page.



The **Action** icon on the *Create Performance Plan: Employees in Hierarchy* page

2. Select the **Action** icon to the right of the employee whose performance plan you need to create to go to the *Create Performance Plan: Setup Details* page.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Setup Details | Overview | Review

Create Performance Plan: Setup Details

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Work Schedule: Full-Time
 Pay Pool ID: [blank]

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Assignment Status: Active Appointment

Setup Details

Current Base Salary: 80979
 Minimum Pay Band Level: 74608
 Maximum Pay Band Level: 124904

* Indicates required field

* Appraisal Type: Annual Appraisal - NSPS
 * Rating Cycle Start Date: 01-Oct-2006
 * Rating Cycle End Date: 30-Sep-2007
 Performance Plan Approval Date: [blank]
 Performance Plan End Date: 30-Sep-2007
 * Appraisal Effective Date: 01-Jan-2008
 * Rating Official: McLean, James
 * Performance Indicators: Professional/Analytic Band 3

Calendar: September 2006

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Fields populated on the *Create Performance Plan: Setup Details* page with the **Next** button indicated

- Review the data in the fields on this page.

The asterisk (*) on the screen indicates that the field is required. The data is auto-populated, but you can override an entry by using the drop-down list or by manually entering data to make changes.

Field	Description
Appraisal Type	Use the <i>Annual Appraisal —NSPS</i> option for normal annual appraisals.
Rating Cycle Start Date	Normally, set the cycle start date to 01-Oct-YYYY.
Rating Cycle End Date	Normally, set the cycle end date to 30-Sep-YYYY.
Performance Plan Approval Date	This field is blank until you approve the plan. After you approve the plan, the approval date is auto-populated.

Field	Description
Performance Plan End Date	Normally, set the performance plan end date to be the same as the rating cycle end date, which is 30-Sep-YYYY.
Appraisal Effective Date	Normally, the appraisal effective date is 01-Jan-YYYY.
Rating Official	This field is auto-populated based on your log-in information.
Performance Indicators	This field is auto-populated based on the employee's pay schedule, pay band, and supervisory status; however, for YP pay plans, the rating official must select the appropriate performance indicators.

4. Select the **Next** button to go to the *Create Performance Plan: Overview* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Setup Details Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Rating of Record and Comments Interim Reviews Closeout Assessments

Create Performance Plan: Overview

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **DD48H50000 01**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Placement in Pay Band
 Current Base Salary **80979**
 Minimum Pay Band Level **74608**
 Maximum Pay Band Level **124904**

Setup Details Return to Top
 Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date
 Rating Cycle End Date **30-Sep-2007**

Relevant Organizational Mission/Strategic Goals Return to Top
 1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives Return to Top
 Add Objective

Job Objective	Status	Update Details	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Select Title									
No data exists.									

The **Relevant Organizational Mission/Strategic Goals** field and the **Add Objectives** button on the *Create Performance Plan: Overview* page

5. Enter your organization's goals and mission in the **Relevant Organizational Mission/Strategic Goals** field.



The text you enter in the **Strategic Organizational Mission/Strategic Goals** field becomes read-only to your employee.

6. Select the **Add Objective** button to go to the *Add Job Objective* page.



[Overview](#) [Review](#)

Add Job Objective

* Indicates required field

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

[Show Relevant Organizational Mission/Strategic Goals](#)

* Job Objective Title
(Enter up to 80 characters)

* Start Date
(example: 20-Sep-2006)

Job Objective Status

Date Last Modified
Job Objective

(Limit to 770 characters)

[Need Help to Write Objectives](#)

Working Version Job Objective
(Limit to 2000 characters)

- Contributing Factors
- [Technical Proficiency](#)
 - [Critical Thinking](#)
 - [Cooperation and Teamwork](#)
 - [Communication](#)
 - [Customer Focus](#)
 - [Resource Management](#)
 - [Leadership](#)

[Show Additional Information on Contributing Factors](#)

Optional Weight

Job Objective Rating

[Show Job Objective Rating](#)

[Show Performance Indicators](#)

Contributing Factor Impact

[Show Contributing Factor Impact](#)

[Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating

Adjusted Weight



Weighted Rating (If Used)





[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Fields and button options on the *Add Job Objective* page

7. Enter the following data:

Field	Description
Job Objective Title	<p>Give a brief description of the job objective. You may enter up to 80 characters.</p> <p>The job objective title must be entered before you can view Show Relevant Organizational Mission/Strategic Goals.</p> <p>It is recommended that you use the following format for job objective titles: "Job Objective [#] - [description]". This will allow your job objectives to be sorted numerically in lists.</p>
Start Date	<p>This field defaults to the current date.</p> <p>Normally it should be the same as the rating cycle start date on the <i>Create Performance Plan: Overview</i> page, but it may be different if an objective does not become active until a later date due to an anticipated change in your employee's job responsibilities.</p>
Job Objective Status	<p>This field auto-populates identifies whether the job objective has been approved or not. It does not populate until after data has been entered in the Job Objective field.</p>
Date Last Modified	<p>This field displays the last time data was saved in either the Job Objective or Working Version Job Objective field.</p>

Field	Description
Job Objective	<p data-bbox="721 338 1380 474">Give a detailed description of the job objective. Job objectives should be specific, measurable, aligned, realistic, and timed (SMART). The character limit for this field is 770.</p> <p data-bbox="737 520 1380 905">  Your employee cannot edit text you enter in this field: however, if your employee entered the text initially, the PAA allows him or her to edit it. In general, to avoid confusion and allow the most editing flexibility, your employee should not enter text into this field. He or she should enter it instead into the Working Version Job Objective field. This allows you and your employee to edit it until you are satisfied that it is final. Then you or your employee cut and paste the text from the Working Version Job Objectives field into this field. </p> <p data-bbox="737 926 1380 1035">  NSPS requires that employees be assigned at least one job objective, and generally three to five. </p>
Working Version Job Objective	<p data-bbox="721 1083 1380 1182">While developing draft job objectives, you and your employee should use this section for the draft versions.</p> <p data-bbox="721 1224 1380 1293">The maximum limit of characters for this field is 2,000.</p> <p data-bbox="721 1335 1380 1503">When the job objective has been approved, the data in the Working Version Job Objective field will be purged. Either you or your employee must transfer the working version to the Job Objective field prior to approval.</p>

Field	Description
Contributing Factors	<p data-bbox="721 338 1385 407">Contributing factors identify the behaviors associated with accomplishment of a job objective.</p> <ul style="list-style-type: none"> <li data-bbox="721 422 1385 575">  The contributing factors are technical proficiency, critical thinking, cooperation and teamwork, communication, customer focus, resource management, and leadership. <li data-bbox="721 604 1385 674">  Generally you should select no more than three contributing factors for each job objective. <li data-bbox="721 703 1385 932">  The leadership contributing factor has to be selected for a supervisory job objective and may be assigned to any employee who is responsible for directing work and developing other employees. It will not be available if your pay band/pay schedule does not allow a leadership contributing factor.
Optional Weight	<p data-bbox="721 978 1385 1119">Weighting job objectives is optional and may only be identified by the rating official. You can enter an optional weight on this page or on the <i>Create Performance Plan: Overview</i> page.</p> <ul style="list-style-type: none"> <li data-bbox="721 1140 1385 1314">  If weighting is used, the total for all job objectives must equal 100 percent. No job objective may be weighted less than 10 percent and weights must be made in increments of 5 percent.

8. Complete the page using one of the following options:

If You...	Then...
Want to cancel the work that has been created so far	Select the Cancel button.
Want to apply what has been done so far and add another job objective	Select the Apply and Add Another button. Repeat step 7.
Want to continue to work on the same page or navigate to other functions	Select the Save and Continue button. Go to Step 9.

9. Select the **Apply** button to add all job objectives and go to the *Create Performance Plan: Overview* page.

The **Next** button on the *Create Performance Plan: Overview* page

10. Select the **Next** button to go to the *Create Performance Plan: Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Setup Details Overview **Review**

Relevant Organizational Mission/Strategic Goals Job Objectives Employee Self-Assessment Rating of Record and Comments

Create Performance Plan: Review

Cancel Save and Continue Transfer to Employee Back Step 3 of 3 **Apply**

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Position 01206.BUDGET ANALYST.73293.DD48.APPR Location Rosslyn, US
 Occupational Code 0560.Budget Analyst (NSPS) Pay Plan/Pay Band YA-03
 Employee Number 36728

Work Schedule Full-Time Assignment Status Active Appointment
 Pay Pool ID

To make changes to the appraisal, click Back.

Setup Details

Appraisal Type Annual Appraisal - NSPS Rating Official McLean, James
 Rating Cycle Start Date 01-Oct-2006 Performance Plan Approval Date
 Rating Cycle End Date 30-Sep-2007

Relevant Organizational Mission/Strategic Goals Return to Top

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

Employee Self-Assessment Return to Top

Rating of Record and Comments Return to Top

Rating of Record
 Rating Official Assessment

Cancel Save and Continue Transfer to Employee Back Step 3 of 3 Apply

Home Logout Preferences

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Show and the Apply button on the *Create Performance Plan: Review* page

11. Review information entered on the performance plan. You can review all the information you have entered on the performance plan before submitting it to the employee for review and comment. To view an individual job objective, select Show. To collapse the job objective, select Hide. This function is available throughout the application.

Job Objectives Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Hide Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

Job Objective
 Working Version Job Objective In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.
 Contributing Factors Technical Proficiency, Critical Thinking, Cooperation and Teamwork,
 Last Modified Date 20-Sep-2006

The *Job Objectives* section with an objective expanded after selecting Show

12. Select the **Apply** button to save the draft performance plan and go to the *Confirmation* page.

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Performance Appraisal Application

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Confirmation
Your changes have been saved.

Rating Official Review

Employee Name: Jeffery Smith
Position: 01206.BUDGET ANALYST.73293.DD48.APPR
Occupational Code: 0560.Budget Analyst (NSPS)
Employee Number: 36728
Work Schedule: Full-Time
Pay Pool ID: [blank]

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Location: Rosslyn, US
Pay Plan/Pay Band: YA-03
Assignment Status: Active Appointment

Setup Details

Appraisal Type: Annual Appraisal - NSPS
Appraisal Period Start Date: 01-Oct-2006
Appraisal Period End Date: 30-Sep-2007
Rating Official: McLean, James
Appraisal Effective Date: 01-Jan-2008
Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

The **Transfer to Employee** button on the *Confirmation* page

13. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page.

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Performance Appraisal Application

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Share Appraisal Details with Employee

Cancel Submit

Details to be Shared with Employee
Select appraisal components completed by the rating official to share with the employee.
 Objective Ratings and Comments

Employee Permissions
Indicate whether the employee can update plan/appraisal.
 Update Plan/Appraisal

Notification Message to Employee
Enter your message, and click Submit to share the appraisal with the employee.

I have created your performance plan. Please review and edit.

Cancel Submit

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The **Submit** button on the *Share Appraisal Details with Employee* page

14. Enter comments to your employee in the **Notification Message to Employee** field. These comments can be instructional or informational in nature. This message will display in your employee's notification under the **Notifications** tab.
15. Select the **Submit** button to send the performance plan to your employee and go to the *Performance Management As Rating Official* page.

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Performance Appraisal Application

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[Notifications](#) [Appraisals](#)

Main Appraiser

Confirmation
The appraisal has been transferred to the employee.

Performance Management As Rating Official [View All Appraisals By Employee](#)

Plans/Appraisals in Progress

Create

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008		Pending	Transferred	Open					

Completed Plans/Appraisals
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

[View All Appraisals By Employee](#)

[Notifications](#) | [Appraisals](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

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The *Performance Management As Rating Official* page



Note that the **Delete** icon for this appraisal is active, indicating that the appraisal can be deleted even though it has been transferred. You, as the rating official, can delete appraisals at any time.

Congratulations!

You have just created a performance plan. It is now transferred to your employee for his or her review and edits.

Performance Plan: Editing the Plan (Rating Official)

After the performance plan has been created by you or your employee, it may require edits and further input from one or both of you. The plan could be routed to you as an empty shell awaiting your input, a final document ready for your review, or a work in progress requiring several rounds of edits by both of you. Your edits can include any of the following:

- Editing draft job objectives created by your employee
- Creating new job objectives
- Selecting contributing factors for job objectives either of you created

After you have finished making edits and have finalized the job objectives to your satisfaction, you approve them. This section shows you how to make edits during the process of finalizing the plan so that they are ready to be approved. During this process, after you have made edits to the plan, you may have to send the plan back to your employee for his or her review or a further round of edits. You and your employee can transfer the plan back and forth as many times as needed during this process.

Following are the typical steps in the performance plan process. The step covered in this section is bold and italicized:

1. The rating official or employee creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).
2. ***The rating official and employee edit or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your employee before the plan is finalized.***
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to review and edit your employee's performance plan:

Department of Defense
Performance Appraisal Application

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Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Plan Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffrey	01-Jan-2008		Pending	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee:

Appraisal Effective Date:

Appraisal Type:

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Notifications** tab on the *Performance Management As Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to retrieve any notifications sent to you by your employee.

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Performance Appraisal Application

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Notifications Appraisals

My Employee Information

Logged In As McLean, James

On this page, you can access worker development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffrey needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page with the notification from your employee

2. Select **The appraisal off [employee name] needs your attention as main appraiser** to go to the *Information* page.

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Information
This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. Close

From: Smith, Jeffery
To: McLean, James
Sent: 02-Oct-2006 12:24:06
ID: 128296

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments
I have created my performance plan. Please review and edit.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Rating of Record and Comments

Rating of Record	
Rating Official Assessment	

Related Applications

Update Action

[Return to Worklist](#) Close


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Update Action on the *Information* page with the employee's comments

3. Review the comments in the *Employee Notification Comments* section.
4. Select Update Action to go to the *Details: Rating Official* page. The *Details: Rating Official* page allows you to review the information about the performance plan.



Do not select the **Close** button unless you want to purge the notification. If you purge the notification using the **Close** button, the plan/appraisal can be accessed through the *My Plans/ Appraisals* page by selecting the **Update** button.



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Performance Appraisal Application

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Details: Rating Official

Employee Name: **Jeffery Smith**

Position: **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code: **0560.Budget Analyst (NSPS)**

Employee Number: **36728**

Work Schedule: **Full-Time**

Pay Pool ID:

Organization: **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Location: **Rosslyn, US**

Pay Plan/Pay Band: **YA-03**

Assignment Status: **Active Appointment**

Setup Details

Type: **Annual Appraisal - NSPS**

Rating Cycle Start Date: **01-Oct-2006**

Rating Cycle End Date: **30-Sep-2007**

Rating Official: **McLean, James**

Performance Plan Approval Date:

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record

Rating Official Assessment

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▼ Hide	Job Objective 1 - FY06 Funding	PENDING						

Additional Details

Working Version Job Objective: **In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.**

Contributing Factors: **Technical Proficiency, Critical Thinking, Cooperation and Teamwork,**

Last Modified Date: **20-Sep-2006**

Rating of Record and Comments

Rating of Record

Rating official assessment

Employee Self-Assessment

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The **Update** button on the *Details: Rating Official* page with job objective expanded by selecting Show

5. Review the job objectives and perform one of the following steps:

If You...	Then...
Want to add to or edit the job objectives	Select the Update button to go to the <i>Rating Official Review</i> page Go to step 6.
Are satisfied with the objectives	Select the Transfer to Employee button to go to the <i>Share Appraisal Details with Employee</i> page. Go to step 11.

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Performance Appraisal Application

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Details: Rating Official >

Rating Official Review

Transfer to Employee **Update Plan/Appraisal** Submit Recommended Ratings

Employee Name Jeffery Smith
Position 01206.BUDGET ANALYST.73293.DD48.APPR
Occupational Code 0560.Budget Analyst (NSPS)
Employee Number 36728
Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Location Rosslyn, US
Pay Plan/Pay Band YA-03
Work Schedule Full-Time
Pay Pool ID
Assignment Status Active Appointment

Setup Details

Appraisal Type Annual Appraisal - NSPS
Rating Cycle Start Date 01-Oct-2006
Rating Cycle End Date 30-Sep-2007
Rating Official McLean, James
Appraisal Effective Date 01-Jan-2008
Performance Plan Approval Date
Change Rating Official

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

Show All Details | Hide All Details


Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Budget	PENDING						

The **Update Plan/Appraisal** button on the *Rating Official Review* page

6. Select the **Update Plan/Appraisal** button to go to the *Update Plan/ Appraisal* page.

The **Add Objective** button and the **Update Details** pencil icon on the *Update Plan/Appraisal* page

7. Perform one of the following actions:

If You...	Then...
Want to add a new job objective	<p>Select the Add Objective button to go to the <i>Add Job Objectives</i> page.</p> <p>Go to step 8.</p>
Want to view and edit an existing job objective	<p>Select the Update Details pencil icon next to a specific objective to go to the <i>Update Job Objective</i> page and edit the job objective.</p> <p>The <i>Update Job Objective</i> page is identical to the <i>Add Objective</i> page, but it contains data while the <i>Add Objective</i> page does not.</p> <p>Go to step 8.</p> <p> You and your employee should work in the Working Version Job Objective field pending approval of the objective.</p>



Overview **Review**

Add Job Objective

* Indicates required field

[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

[Show Relevant Organizational Mission/Strategic Goals](#)

* Job Objective Title
(Enter up to 80 characters)

* Start Date
(example: 20-Sep-2006)

Job Objective Status

Date Last Modified
Job Objective
(Limit to 770 characters)

[Need Help to Write Objectives](#)

Working Version Job Objective
(Limit to 2000 characters)

Contributing Factors
 Technical Proficiency [?](#)
 Critical Thinking [?](#)
 Cooperation and Teamwork [?](#)
 Communication [?](#)
 Customer Focus [?](#)
 Resource Management [?](#)
 Leadership [?](#)

[Show Additional Information on Contributing Factors](#)

Optional Weight

Job Objective Rating

[Show Job Objective Rating](#)

[Show Performance Indicators](#)

Contributing Factor Impact

[Show Contributing Factor Impact](#)

[Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating

Adjusted Weight



Weighted Rating (If Used)





[Cancel](#) [Save and Continue](#) [Apply and Add Another](#) [Apply](#)

Button options on the *Add Job Objective* page

8. Enter or revise data in the following fields:

Field	Description
Job Objective Title	<p>Give a brief description of the job objective. You may enter up to 80 characters.</p> <p>The job objective title must be entered before you can view Show Relevant Organizational Mission/Strategic Goals.</p> <p>It is recommended that you use the following format for job objective titles: "Job Objective [#] - [description]". This will allow your job objectives to be sorted numerically in lists.</p>
Start Date	<p>This field defaults to the current date.</p> <p>Normally it should be the same as the rating cycle start date on the <i>Create Performance Plan: Overview</i> page, but it may be different if an objective does not become active until a later date due to an anticipated change in your employee's job responsibilities.</p>
Job Objective Status	<p>This field auto-populates identifies whether the job objective has been approved or not. It does not populate until after data has been entered in the Job Objective field.</p>
Date Last Modified	<p>This field displays the last time data was saved in either the Job Objective or Working Version Job Objective field.</p>

Field	Description
Job Objective	<p data-bbox="721 338 1380 474">Give a detailed description of the job objective. Job objectives should be specific, measurable, aligned, realistic, and timed (SMART). The character limit for this field is 770.</p> <p data-bbox="737 520 1380 905">  Your employee cannot edit text you enter in this field: however, if your employee entered the text initially, the PAA allows him or her to edit it. In general, to avoid confusion and allow the most editing flexibility, your employee should not enter text into this field. He or she should enter it instead into the Working Version Job Objective field. This allows you and your employee to edit it until you are satisfied that it is final. Then you or your employee cut and paste the text from the Working Version Job Objectives field into this field. </p> <p data-bbox="737 926 1380 1035">  NSPS requires that employees be assigned at least one job objective, and generally three to five. </p>
Working Version Job Objective	<p data-bbox="721 1083 1380 1182">While developing draft job objectives, you and your employee should use this section for the draft versions.</p> <p data-bbox="721 1224 1380 1293">The maximum limit of characters for this field is 2,000.</p> <p data-bbox="721 1335 1380 1503">When the job objective has been approved, the data in the Working Version Job Objective field will be purged. Either you or your employee must transfer the working version to the Job Objective field prior to approval.</p>

Field	Description
Contributing Factors	<p data-bbox="722 338 1385 405">Contributing factors identify the behaviors associated with accomplishment of a job objective.</p> <ul style="list-style-type: none"> <li data-bbox="722 426 1385 573">  The contributing factors are technical proficiency, critical thinking, cooperation and teamwork, communication, customer focus, resource management, and leadership. <li data-bbox="722 611 1385 678">  Generally you should select no more than three contributing factors for each job objective. <li data-bbox="722 716 1385 930">  The leadership contributing factor has to be selected for a supervisory job objective and may be assigned to any employee who is responsible for directing work and developing other employees. It will not be available if your pay band/pay schedule does not allow a leadership contributing factor.
Optional Weight	<p data-bbox="722 978 1385 1119">Weighting job objectives is optional and may only be identified by the rating official. You can enter an optional weight on this page or on the <i>Create Performance Plan: Overview</i> page.</p> <ul style="list-style-type: none"> <li data-bbox="722 1140 1385 1314">  If weighting is used, the total for all job objectives must equal 100 percent. No job objective may be weighted less than 10 percent and weights must be made in increments of 5 percent.

9. Perform one of the following actions:

If You...	Then...
Want to continue to add or edit objectives	<p>Select the Apply and Add Another button to save what you have entered and return to the <i>Add Job Objective</i> page (or the <i>Update Job Objective</i> page if you are editing).</p> <p>Return to step 8.</p>
Have completed entering or editing job objectives	<p>Select the Apply button to go to the <i>Rating Official Review</i> page.</p> <p>Continue with step 10.</p> <p>The status of job objectives displays as “pending” until they are approved.</p>

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Rating Official Review

Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings

Employee Name: Jeffrey Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Work Schedule: Full-Time
 Pay Pool ID:
 Assignment Status: Active Appointment

Setup Details

Appraisal Type: Annual Appraisal - NSPS
 Rating Cycle Start Date: 01-Oct-2006
 Rating Cycle End Date: 30-Sep-2007
 Rating Official: McLean, James
 Appraisal Effective Date: 01-Jan-2008
 Performance Plan Approval Date:

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

The **Transfer to Employee** button on the *Rating Official Review* page

10. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page and complete the transfer.

Comments entered for the employee and the **Submit** button on the *Share Appraisal Details with Employee* page

11. Enter comments regarding the performance plan in the **Notification Message to Employee** field.
12. Select the **Submit** button to transfer the performance plan to the employee and return to the *Notifications Awaiting Your Attention* page.

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	02-Oct-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	02-Oct-2006		

The *Notifications Awaiting Your Attention* page

Congratulations!

You have successfully reviewed your employee’s performance plan and added a job objective. The performance plan has been transferred back to your employee for review.

Performance Plan: Approving Job Objectives

As part of the performance planning process, the job objectives, applicable contributing factors, and assigned weights must be reviewed by the employee, approved by you, and receive a higher-level review. This section shows you how to approve the job objectives.

Approval of the performance plan must occur 30 days from the start of the rating cycle, entrance of duty, or employee job change, unless an extension has been granted.



Ensure that any job objective text is cut and pasted from the **Working Version Job Objective** field into the **Job Objective** field before approving the objective. All text in the **Working Version Job Objective** field is purged when the objective is approved.

After approval of the objectives, engage your employee in a performance plan conversation to ensure that you both understand what is expected of him or her, based on the job objectives and contributing factors. This is important because these objectives form the basis of the performance appraisals and ratings conducted at the end of the rating cycle.

After the conversation, your employee acknowledges in the PAA that the plan has been communicated to him or her.

As described earlier, the typical steps in the performance plan process are as follows. The step covered in this section is bold and italicized:

1. The rating official or employee creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).
2. The rating official and employee edit or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your employee before the plan is finalized.
- 3. *The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.***
4. The employee reviews the performance plan and acknowledges that the plan was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to approve the job objectives, applicable contributing factors, and assigned weights:

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008		Pending	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee:

Appraisal Effective Date:

Appraisal Type:

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Notifications** tab on the *Performance Management As Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to go to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Logged In As McLean, James


Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page

2. Select [The appraisal of \[Employee name\] needs your attention as main appraiser](#) to go to the *Information* page.

 **Department of Defense** [Home](#) [Logout](#) [Preferences](#) [Oracle Help](#)

Information
 This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. [Close](#)

From **Smith, Jeffery**
 To **McLean, James**
 Sent **20-Sep-2006 12:00:41**
 ID **127713**

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments
 I reviewed the plan and added an objective. I agree with the job objective you created.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Rating of Record and Comments

Rating of Record	
Rating Official Assessment	

Related Applications

[Update Action](#)

[Return to Worklist](#) [Close](#)

Copyright (c) 2005, Oracle. All rights reserved. [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#) [Oracle Privacy Statement](#)

The **Update Action** button and *Employee Notification Comments* section on the *Information* page

3. Review your employee's comments in the *Employee Notifications Comments* section.
4. Select Update Action to go to the *Details: Rating Official* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Details: Rating Official

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Work Schedule: Full-Time
 Pay Pool ID: [blank]

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Assignment Status: Active Appointment

Setup Details

Type: Annual Appraisal - NSPS
 Rating Cycle Start Date: 01-Oct-2006
 Rating Cycle End Date: 30-Sep-2007
 Rating Official: McLean, James
 Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

Job Objectives

Show All Details | Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Funding	PENDING						
Show	Job Objective 2 - Req Docs	PENDING						

The **Update** button on the *Details: Rating Official* page

5. Select the **Update** button to go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Details: Rating Official >

Rating Official Review

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Work Schedule: Full-Time
 Pay Pool ID: [blank]

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Assignment Status: Active Appointment

Setup Details

Appraisal Type: Annual Appraisal - NSPS
 Appraisal Period Start Date: 01-Oct-2006
 Appraisal Period End Date: 30-Sep-2007
 Rating Official: McLean, James
 Appraisal Effective Date: 01-Jan-2008
 Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

Job Objectives

Show All Details | Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Funding	PENDING						
Show	Job Objective 2 - Req Docs	PENDING						

The **Update Plan/Appraisal** button on the *Rating Official Review* page

6. Select the **Update Plan/Appraisal** button to go to the *Update Plan/ Appraisal* page.

The **Approve**, **Select All**, **Select None**, and **Select** buttons in the Job Objective section of the *Update Plan/Appraisal* page

7. Choose an option for approving job objectives, as follows:

If You...	Then...
Wish to approve all job objectives at once	Select <u>Select All</u> .
Want to approve each job objective individually	Select the check boxes in the Select column to approve each objective individually.
Have selected the check boxes for some job objectives, but want to clear all of them and start over	Select <u>Select None</u> .

8. Select the **Approve** button to change the status of the job objectives from Pending to Approved.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Update Plan/Appraisal

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03

Work Schedule: Full-Time
 Pay Pool ID: [blank]
 Assignment Status: Active Appointment

Setup Details
 * Indicates required field

Appraisal Type: Annual Appraisal - NSPS
 * Rating Cycle Start Date: 01-Oct-2006
 * Rating Cycle End Date: 30-Sep-2007
 Rating Official: McLean, James
 * Appraisal Effective Date: 01-Jan-2008

Assignment Number: 36728
 Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Select Object: **Approve** | Add Objective

Select All | Select None

Select	Details	Objective Title	Status	Update Details	Optional Weight	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
<input type="checkbox"/>	Show	Job Objective 1 FY06 Funding	APPROVED	[edit icon]	[dropdown]						[trash icon]
<input type="checkbox"/>	Show	Job Objective 2 Req Docs	APPROVED	[edit icon]	[dropdown]						[trash icon]

The **Apply** button and Job objective status changed from Pending to Approved on the *Update Plan/Appraisal* page

9. Select the **Apply** button to go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review [Transfer to Employee](#) [Update Plan/Appraisal](#)

Employee Name: Jeffery Smith
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR
 Occupational Code: 0560.Budget Analyst (NSPS)
 Employee Number: 36728
 Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE
 Location: DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-03
 Work Schedule: Full-Time
 Pay Pool ID:
 Assignment Status: Active Appointment

Setup Details [Change Rating Official](#)

Appraisal Type: Annual Appraisal - NSPS
 Appraisal Period Start Date: 01-Oct-2006
 Appraisal Period End Date: 30-Sep-2007
 Rating Official: McLean, James
 Appraisal Effective Date: 01-Jan-2008
 Performance Plan Approval Date:
 Relevant Organizational Mission/Strategic Goals:
 1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments
 Rating of Record
 Rating Official Assessment

Job Objectives
[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

The **Transfer to Employee** button on the *Rating Official Review* page

10. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page.

Remember that you have not approved the performance plan yet, just the job objectives. However, you must transfer the performance plan to your employee now so that he or she can acknowledge that you have communicated the plan to him or her. After your employee acknowledges it and transfers it back, you can approve the plan.

The **Submit** button and the **Notification Message to Employee** field on the *Share Appraisal Details with Employee* page

11. Enter a message for your employee in the **Notification Message to Employee** field.
12. Select the **Submit** button to transfer the performance plan and go to the *Performance Management As Rating Official* page.

The *Performance Management As Rating Official* page

Congratulations!

You have just approved the job objectives and contributing factors for the performance plan. The plan has been transferred for the employee's acknowledgement.

Performance Plan: Approving the Plan

After you have approved the job objectives, applicable contributing factors, and assigned weights for your employee, and your employee has acknowledged them in the PAA, you are ready to approve the performance plan.

During the approval process, document how the plan was delivered to your employee (for example, face-to-face or via telephone), and the date when it was delivered.

If an employee is not available to acknowledge the plan or refuses to acknowledge the plan, document this information also.

Note that you have approved the job objectives, applicable contributing factors, and assigned weights as a separate step from the performance plan as a whole.



You should avoid approving a performance plan that has unapproved objectives in it, because this could lead to erroneous ratings of record. At the end of the process, you could mistakenly assume that because the plan is approved, all of the objectives are also. However, objectives that are not approved will not be calculated as part of the rating of record. Therefore, you should only approve performance plans in which all objectives are approved.



Do not route the approved plan back to your employee simply to serve as notification that the plan was approved. When you transfer the plan, you also transfer ownership. This prevents you from editing it until it is transferred back to you.

Approval of the performance plan must occur before October 31, unless an extension has been granted.

As described earlier, the typical steps in the performance plan process are as follows. The step covered in this section is bold and italicized:

1. The rating official or employee creates the performance plan and enters draft job objectives and contributing factors (the rating official also can enter optional weights for the job objectives).
2. The rating official and employee edit or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your employee before the plan is finalized.
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. ***The rating official approves the performance plan.***

Follow these steps to approve the performance plan:

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008		Pending	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee:

Appraisal Effective Date:

Appraisal Type:

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Notifications** tab on the *Performance Management As Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to go to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Logged In As McLean, James

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page

2. Select The appraisal of [Employee name] needs your attention as main appraiser to go to the *Information* page.

 **Department of Defense** [Home](#) [Logout](#) [Preferences](#) [Oracle Help](#)

Information
 This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. [Close](#)

From: Smith, Jeffery
 To: McLean, James
 Sent: 20-Sep-2006 14:05:00
 ID: 127715

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments
 I have acknowledged the performance plan. It is ready for your approval.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Rating of Record and Comments

Rating of Record	
Rating Official Assessment	

Related Applications

[Update Action](#)

[Return to Worklist](#) [Close](#)

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Update Action and the *Employee Notification Comments* section on the *Information* page

3. Review your employee's comments in the *Employee Notifications Comments* section.
4. Select Update Action to go to the *Details: Rating Official* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Details: Rating Official [Update](#) [Transfer to Employee](#)

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Setup Details

Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date
 Rating Cycle End Date **30-Sep-2007**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment


Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Funding	APPROVED						
Show	Job Objective 2 - Req Docs	APPROVED						

The **Update** button on the *Details: Rating Official* page

5. Select the **Update** button to go to the *Rating Official Review* page.



Department of Defense

Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

[Details: Rating Official](#) >

Rating Official Review

[Transfer to Employee](#)
[Update Plan/Appraisal](#)
[Submit Recommended Ratings](#)

Employee Name: **Jeffery Smith**

Position: **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code: **0560.Budget Analyst (NSPS)**

Employee Number: **36728**

Work Schedule: **Full-Time**

Pay Pool ID:

Organization: **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Location: **Rosslyn, US**

Pay Plan/Pay Band: **YA-03**

Assignment Status: **Active Appointment**

Setup Details

Appraisal Type: **Annual Appraisal - NSPS**

Appraisal Period Start Date: **01-Oct-2006**

Appraisal Period End Date: **30-Sep-2007**

Rating Official: **McLean, James**

Appraisal Effective Date: **01-Jan-2008**

Performance Plan Approval Date:

[Change Rating Official](#)

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record

Job Objectives

[Show All Details](#)
[Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment


Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve		ACKNOWLEDG	20-Sep-2006			

The Approvals and Acknowledgements section of Rating Official Review page with the **Approve** button and the **Communication Date**, **Communication Method**, and **Other Communication Method** fields highlighted

6. Enter the date when the performance plan was communicated to your employee in the **Communication Date** field.

7. Enter the method used to communicate the plan, as follows:

If You...	Then...
Communicated the performance plan by face-to-face meeting or telephone	Select <i>Face-to-Face</i> or <i>Telephone</i> , as appropriate, in the Communication Method field.
Communicated the performance plan using some other method	Select <i>Other</i> in the Communication Method field and enter a short description of the method in the Other Communication Method field (20-characters maximum).
	 If your employee refuses to acknowledge the performance plan or is not available to electronically acknowledge it, select Other under Communication Method and document it in the Other Communication Method field.

8. Select the **Approve** button to approve the performance plan and go to the *Rating Official Review* page.

Notice that the **Approve** button is now gray and the values for the performance plan are populated (and read-only).



Rating Official Review

[Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#)

Employee Name **Jeffery Smith**

Organization **CIVILIAN PERSONNEL
MANAGEMENT SERVICE
DD48H50000 01**
Location **Rosslyn, US**

Position **01206.BUDGET
ANALYST.73293.DD48.APR**
Occupational Code **0560.Budget Analyst (NSPS)**
Employee Number **36728**

Pay Plan/Pay Band **YA-03**

Work Schedule **Full-Time**
Pay Pool ID

Assignment Status **Active Appointment**

Setup Details

[Change Rating Official](#)

Appraisal Type **Annual Appraisal - NSPS**
Appraisal Period Start Date **01-Oct-2006**
Appraisal Period End Date **30-Sep-2007**
Rating Official **McLean, James**

Appraisal Effective Date **01-Jan-2008**
Performance Plan Approval Date **20-Sep-2006**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Closeout Assessments

[Create Closeout Assessment](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

[Return to Notification Details](#)

[Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#)

Approved performance plan details in *Approvals and Acknowledgements* section on *Rating Official Review* page

Congratulations!

You have approved the performance plan.

Interim Review: Creating the Interim Review

An interim review can be done at any time during the rating cycle, but it is required at least once. The system allows multiple interim reviews, if desired. The timing and number of interim reviews (greater than one) is at your Component's or organization's discretion.

If you conduct only one interim review, it should be done at the mid-term of the cycle.

In preparing for an interim review, employees are encouraged to complete self-assessments to help you judge the employee's progress toward his or her job objectives. Self-assessments are optional; however, as in the case of performance plans, employees should be actively involved in the performance management process. Encouraging your employees to write self-assessments for interim reviews encourages motivation and accountability and helps you to make a more informed assessment of their performance.

The typical steps in the interim review process are as follows. Steps 1-3 are similar to those performed for end-of-cycle reviews. The step covered in this section is in bold and italicized:

- 1. The rating official creates the interim review and transfers responsibility to the employee to write a self-assessment.***
2. The employee provides the self-assessment.
3. The rating official reviews the self-assessment and provides an interim assessment of the employee.
4. The employee reviews the rating official's assessment and acknowledges it.
5. The rating official approves the interim review.

Follow these steps to create an interim review:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan (Go)

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

(Go) Clear


Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Appraise** pencil icon in the *Plans/Appraisals in Progress* section of the *Performance Management As Rating Official* page

1. Select the **Appraise** pencil icon adjacent to an employee name to go to the *Rating Official Review* page for that employee.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

Rating Official Review [Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#)

Employee Name: Jeffery Smith Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE
 Position: 01206.BUDGET ANALYST.73293.DD48.APPR Location: Rosslyn, US
 Occupational Code: 0560.Budget Analyst (NSPS) Pay Plan/Pay Band: YA-03
 Employee Number: 36728

Work Schedule: Full-Time Assignment Status: Active Appointment
 Pay Pool ID

Setup Details [Change Rating Official](#)

Appraisal Type: Annual Appraisal - NSPS Appraisal Effective Date: 01-Jan-2008
 Appraisal Period Start Date: 01-Oct-2006 Performance Plan Approval Date: 20-Sep-2006
 Appraisal Period End Date: 30-Sep-2007
 Rating Official: McLean, James

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Closeout Assessments

[Create Closeout Assessment](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

[Return to Performance Management As Rating Official](#) [Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#)

[Home](#) | [Logout](#) | [Preferences](#) [Oracle Privacy Statement](#)

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The **Create Interim Review** button in the *Interim Reviews* section on the *Rating Official Review* page

2. Select the **Create Interim Review** button to open the *Update Interim Review* section.


Interim Reviews


Create Interim Review

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

Create Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of concerns.

* Interim Review Start Date 

* Interim Review End Date 

Communication Date

Communication Method

Other Communication Method

Rating Official Assessment for Interim Review

The **Interim Review Start Date** and **Interim Review End Date** fields in the *Update Interim Review* section

3. Enter the beginning of the period covered by the interim review in the **Interim Review Start Date** field in the format DD-**MMM**-YYYY (for example, 01-Oct-2006).
4. Enter the last date of the period covered by the interim review in the **Interim Review Start Date** field in the format DD-**MMM**-YYYY (for example, 01-Mar-2007).
5. Select the **Save** button to save the dates and go to the *Rating Official Review* page.



Department of Defense

Performance Appraisal Application

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Rating Official Review

Employee Name: **Jeffery Smith**

Position: **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code: **0560.Budget Analyst (NSPS)**

Employee Number: **36728**

Work Schedule: **Full-Time**

Pay Pool ID:

Organization: **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Location: **Rosslyn, US**

Pay Plan/Pay Band: **YA-03**

Assignment Status: **Active Appointment**

[Transfer to Employee](#) | [Update Plan/Appraisal](#) | [Submit Recommended Ratings](#)

Setup Details

Appraisal Type: **Annual Appraisal - NSPS**

Appraisal Period Start Date: **01-Oct-2006**

Appraisal Period End Date: **30-Sep-2007**

Rating Official: **McLean, James**

Appraisal Effective Date: **01-Jan-2008**

Performance Plan Approval Date: **20-Sep-2006**

[Change Rating Official](#)

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
▶ Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	✎

Closeout Assessments

[Create Closeout Assessment](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

[Return to Performance Management As Rating Official](#)

[Transfer to Employee](#) | [Update Plan/Appraisal](#) | [Submit Recommended Ratings](#)

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The **Transfer to Employee** button on the *Rating Official Review* page, showing updated information for the interim review

6. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page to invite the employee to provide a self-assessment.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Share Appraisal Details with Employee Cancel Submit

Details to be Shared with Employee
Select appraisal components completed by the rating official to share with the employee.
 Objective Ratings and Comments

Employee Permissions
Indicate whether the employee can update plan/appraisal.
 Update Plan/Appraisal

Notification Message to Employee
Enter your message, and click Submit to share the appraisal with the employee.

I have created an interim review. Please provide your self-assessment for it.

Cancel Submit

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The **Submit** button and the **Notification Message to Employee** field on the *Share Appraisal Details with Employee* page

7. Enter the message inviting your employee to provide a self-assessment for the interim review in the **Notification Message to Employee** field.
8. Select the **Submit** button to transfer the interim review and go to the *Performance Management As Rating Official* page.

Department of Defense
Performance Appraisal Application

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Notifications Appraisals

Main Appraiser

Confirmation
The appraisal has been transferred to the employee.

Performance Management As Rating Official View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James Smith, Jeffery		01-Jan-2008	20-Sep-2006	Approved	Transferred	Open					

Completed Plans/Appraisals
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee Last Name, Title, First Name

Appraisal Effective Date (example: 20-Sep-2006)

Appraisal Type

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The *Performance Management As Rating Official* page

Congratulations!

You have just created the interim review and invited your employee to write a self-assessment. Now, your employee can write the self-assessment.

Interim Review: Entering the Assessment for the Interim Review

After you have received the employee's self-assessment, enter your assessment in the interim review.

As described earlier, the typical steps in the interim review process are as follows. The step covered in this section is in bold and italicized:

1. The rating official creates the interim review and transfers responsibility to the employee to write a self-assessment.
2. The employee provides the self-assessment.
- 3. *The rating official reviews the self-assessment and provides an interim assessment of the employee.***
4. The employee reviews the rating official's assessment and acknowledges it.
5. The rating official approves the interim review.

Follow these steps to enter the assessment for the interim review:

Department of Defense
Performance Appraisal Application

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Notifications | Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee:

Appraisal Effective Date:

Appraisal Type:

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Notifications** tab on the *Performance Management As Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to go to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Notifications | Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page

2. Select The appraisal of [Employee name] needs your attention as main appraiser to go to the *Information* page.

The screenshot shows the Oracle HR system interface for the Department of Defense. At the top left is the Department of Defense logo. The page title is "Information". Below the title, a notification states: "This notification does not require a response." The main heading is "The appraisal of Smith, Jeffery needs your attention as main appraiser." with a "Close" button. Below this is an email header: "From: Smith, Jeffery; To: McLean, James; Sent: 20-Sep-2006 16:40:01; ID: 127717". A "Summary" section follows, listing employee details: Employee Name (Jeffery Smith), Organization (CIVILIAN PERSONNEL MANAGEMENT SERVICE), Position (ANALYST.73293.DD48.APPR), Location (Rosslyn, US), Occupational Code (0560.Budget Analyst (NSPS)), Employee Number (36728), Pay Plan/Pay Band (YA-03), Work Schedule (Full-Time), and Assignment Status (Active Appointment). Below the summary is the "Employee Notification Comments" section, which contains the text: "I have provided a self-assessment for the interim review". The "Appraisal Details" section lists: Rating Cycle End Date (30-Sep-2007), Appraisal Type (Annual Appraisal - NSPS), Rating Cycle Start Date (01-Oct-2006), Appraisal Effective Date (01-Jan-2008), and Rating Official Name (McLean, James). The "Rating of Record and Comments" section shows "Rating of Record" and "Rating Official Assessment". The "Related Applications" section has a button labeled "Update Action". At the bottom, there are links for "Return to Worklist" and "Close", and a footer with "Copyright (c) 2005, Oracle. All rights reserved." and "Oracle Privacy Statement".

Update Action and the *Employee Notification Comments* section on the *Information* page

3. Review your employee's comments in the *Employee Notifications Comments* section.
4. Select Update Action to go to the *Details: Rating Official* page.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

Details: Rating Official

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL
MANAGEMENT SERVICE
DD48H50000 01**

Position **01206.BUDGET
ANALYST.73293.DD48.APPR** Location **Rossllyn, US**

Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**

Pay Pool ID

Setup Details

Type **Annual Appraisal - NSPS** Rating Official **McLean, James**

Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**

Rating Cycle End Date **30-Sep-2007**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						


Employee Self-Assessment

[Return to Notification Details](#)

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The **Update** button on the *Details: Rating Official* page

5. Select the **Update** button to go to the *Rating Official Review* page.



Department of Defense

Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

[Details: Rating Official](#) >

Rating Official Review

[Transfer to Employee](#)
[Update Plan/Appraisal](#)
[Submit Recommended Ratings](#)

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	

Work Schedule Full-Time	Assignment Status Active Appointment
Pay Pool ID	

Setup Details

[Change Rating Official](#)

Appraisal Type Annual Appraisal - NSPS	Appraisal Effective Date 01-Jan-2008
Appraisal Period Start Date 01-Oct-2006	Performance Plan Approval Date 20-Sep-2006
Appraisal Period End Date 30-Sep-2007	
Rating Official McLean, James	

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
▶ Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	Update

Closeout Assessments


[Create Closeout Assessment](#)

Details	Start Date	End Date	Initiator	Status	Update
No data exists.					

[Return to Notification Details](#)
[Transfer to Employee](#)
[Update Plan/Appraisal](#)
[Submit Recommended Ratings](#)

The **Update** pencil icon on the *Rating Official Review* page

6. Select the **Update** pencil icon to open the *Update Interim Review* section.



Department of Defense

Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

Rating Official Review

Employee Name: **Jeffery Smith**

Position: 01206.BUDGET ANALYST.73293.DD48.APPR

Occupational Code: 0560.Budget Analyst (NSPS)

Employee Number: 36728

Work Schedule: Full-Time

Pay Pool ID:

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01

Location: Rosslyn, US

Pay Plan/Pay Band: YA-03

Assignment Status: Active Appointment

Setup Details

Appraisal Type: Annual Appraisal - NSPS

Appraisal Effective Date: 01-Jan-2008

Appraisal Period Start Date: 01-Oct-2006

Performance Plan Approval Date: 20-Sep-2006

Appraisal Period End Date: 30-Sep-2007

Rating Official: McLean, James

Relevant Organizational Mission/Strategic Goals

- Provide responsive, best value supplies and services to customers.
- Proactively provide budget and contracting support to Program Managers.
- Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record

Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Funding	APPROVED						
Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	Update

[Update Interim Review](#)

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of concerns.

Interim Review Start Date:

Interim Review End Date:

Communication Date:

Communication Method:

Other Communication Method:

Interim Review Initiator: **McLean, James**

Interim Review Status: **PENDING**

Approve

Interim Review Approved Date:

Employee Acknowledged:

Emp Acknowledged Date:

Rating Official Assessment for Interim Review: Jeffery is accomplishing his objectives. He provides accurate budget data to program staff. His reports are good at "telling a story" as it relates to his programs. They are concise and timely.

Employee Self-Assessment for Interim Review: I have produced very accurate budget forecasts for my program areas. I worked well with program subject matter experts to understand their needs and prepare reasonable budgets that get approved. I have provided quality budget support to my customers as indicated by my customer service ratings. Customer service ratings have been 4.6 and above on both technical and interpersonal skill/support

The **Save** button and the **Rating Official Assessment for Interim Review** field on the *Interim Reviews* section on the *Rating Official Review* page

- Enter your assessment for the interim review in the **Rating Official Assessment for Interim Review** field.

8. Select the **Save** button to save the assessment and go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review

Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**

Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**

Pay Pool ID

Setup Details

Change Rating Official

Appraisal Type **Annual Appraisal - NSPS** Appraisal Effective Date **01-Jan-2008**

Appraisal Period Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**

Appraisal Period End Date **30-Sep-2007**

Rating Official **McLean, James**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

The **Transfer to Employee** button on the *Rating Official Review* page

9. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Share Appraisal Details with Employee

Cancel Submit

Details to be Shared with Employee

Select appraisal components completed by the rating official to share with the employee.

Objective Ratings and Comments

Employee Permissions

Indicate whether the employee can update plan/appraisal.

Update Plan/Appraisal

Notification Message to Employee

Enter your message, and click Submit to share the appraisal with the employee.

I read your self-assessment and provided my assessment for the interim review. Please acknowledge.

Cancel Submit

Home | Logout | Preferences

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The **Submit** button and the **Notification Message to Employee** field on the *Share Appraisal Details with Employee* page

10. Enter a message for your employee in the **Notification Message to Employee** field.
11. Select the **Submit** button to transfer the interim review to your employee and go to the *Performance Management As Rating Official* page.


Department of Defense
 Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

[Notifications](#) | [Appraisals](#)

Main Appraiser

Confirmation

The appraisal has been transferred to the employee.

Performance Management As Rating Official [View All Appraisals By Employee](#)

Plans/Appraisals in Progress

Create Performance Plan

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Transferred	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

[View All Appraisals By Employee](#)

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The Performance Management As Rating Official page

Congratulations!

You have just reviewed the employee's self-assessment and provided your assessment of the employee. The interim review has been transferred back to your employee for acknowledgement.

Interim Review: Approving the Interim Review

After your employee acknowledges and routes the interim review back to you (or clearly refuses to acknowledge the interim review), you approve it. This locks the review for further changes, providing a permanent record of the review.

Similar to performance plans, during the approval process you document the date and manner in which the review was communicated (for example, face-to-face or via telephone).



Do not route an approved interim review back to your employee simply to serve as notification that the plan was approved. When you transfer the plan, you also transfer ownership. This prevents you from editing it until it is transferred back to you.

As described earlier, the typical steps in the interim review process are as follows. The step covered in this section is bold and italicized:

1. The rating official creates the interim review record and transfers responsibility to the employee to write a self-assessment.
2. The employee provides the self-assessment.
3. The rating official reviews the self-assessment and provides an interim assessment of the employee.
4. The employee reviews the rating official's assessment and acknowledges it.
5. ***The rating official approves the interim review.***

Follow these steps to approve an interim review:

The screenshot shows the Oracle Performance Appraisal Application interface for the Department of Defense. The page title is "Performance Management As Rating Official". There are tabs for "Notifications" and "Appraisals". A table titled "Plans/Appraisals in Progress" contains one entry for James Smith, with an appraisal effective date of 01-Jan-2008 and a status of "Ongoing". Below this is a search section for "Completed Plans/Appraisals" with fields for Employee (Last Name, Title, First Name), Appraisal Effective Date, and Appraisal Type. A "Go" button is present. At the bottom, there is a table with columns for Employee, Appraisal Effective Date, Rating Cycle Start Date, Rating Cycle End Date, Appraisal Type, Details, and Delete. The footer includes copyright information for Oracle and a privacy statement link.

The **Notifications** tab on the *Performance Management as Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to go to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Logged In As McLean, James

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page

2. Select The appraisal of [employee name] needs your attention as main appraiser to go to the *Rating Official Review* page.

Department of Defense

Home Logout Preferences Oracle Help

Information

This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. Close

From Smith, Jeffery
To McLean, James
Sent 20-Sep-2006 18:17:28
ID 127719

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments

I acknowledged the interim review. You can now approve it.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Rating of Record and Comments

Rating of Record	
Rating Official Assessment	

Related Applications


Update Action

Return to Worklist Close

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The *Interim Review* section of the *Rating Official Review* page, with Update Action highlighted

3. Review your employee's comments.
4. Select Update Action to go to the *Details: Rating Official* page.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

Details: Rating Official

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **DD48H50000 01**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Setup Details

Type **Annual Appraisal - NSPS** Rating Official **McLean, James**
 Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**
 Rating Cycle End Date **30-Sep-2007**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment


[Return to Notification Details](#)

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The **Update** button on the *Details: Rating Official* page

5. Select the **Update** button to go to the *Rating Official Review* page.



Department of Defense

Performance Appraisal Application

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Details: Rating Official >

Rating Official Review

[Transfer to Employee](#)
[Update Plan/Appraisal](#)
[Submit Recommended Ratings](#)

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728	Work Schedule	Full-Time
Pay Pool ID		Assignment Status	Active Appointment

Setup Details

[Change Rating Official](#)

Appraisal Type	Annual Appraisal - NSPS	Appraisal Effective Date	01-Jan-2008
Appraisal Period Start Date	01-Oct-2006	Performance Plan Approval Date	20-Sep-2006
Appraisal Period End Date	30-Sep-2007		
Rating Official	McLean, James		

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#)
[Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

☑ TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
▶ Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	Update

The **Update** pencil icon on the *Rating Official Review* page

6. Select the **Update** pencil icon to open the *Update Interim Review* section.

Interim Reviews

Create Interim Review

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	PENDING	

Update Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of concerns.

Interim Review Start Date: 01-Oct-2006

Interim Review End Date: 01-Mar-2007

Communication Date: 15-Mar-2007

Communication Method: Face to Face

Other Communication Method:

Interim Review Initiator: McLean, James

Interim Review Status: PENDING

Approve

Interim Review Approved Date:

Employee Acknowledge: ACKNOWLEDGED

Emp Acknowledged Date: 20-Sep-2006

Rating Official Assessment for Interim Review: Jeffery is accomplishing his objectives. He provides accurate budget data to program staff. His reports are good at "telling a story" as it relates to his programs. They are concise and timely.

Employee Self-Assessment for Interim Review: I have produced very accurate budget forecasts for my program areas. I worked well with program subject matter experts to understand their needs and prepare reasonable budgets that get approved. I have provided quality budget support to my customers as indicated by my customer service ratings. Customer service ratings have been 4.6 and above on both technical and interpersonal skill/support

The **Approve** check box and the fields to complete on the *Update Interim Review* page

7. Review the interim review information.
8. Complete the following fields:

Field	Description
Communication Date	Enter the date when the communication of the interim review took place, in DD- MMM-YYYY format.
Communication Method	Use the drop-down menu to select the appropriate communication method. If you select Other , enter the communication method you used in the Other Communication Method field.
Approve Check box	Select the Approve check box.

9. Select the **Save** button. You remain on the *Rating Official Review* page.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

Rating Official Review [Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#)

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL
MANAGEMENT SERVICE**
 Position **01206.BUDGET
ANALYST.73293.DD48.APPR** Location **DD48H50000 01
Rosslyn, US**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Setup Details [Change Rating Official](#)

Appraisal Type **Annual Appraisal - NSPS** Appraisal Effective Date **01-Jan-2008**
 Appraisal Period Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**
 Appraisal Period End Date **30-Sep-2007**
 Rating Official **McLean, James**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments Rating of Record
 Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show	Job Objective 1 - FY06 Funding	APPROVED						
Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

Approvals and Acknowledgements

Item	RO Approval	RO Approve Date	Emp Ack	Emp Ack Date	Communication Date	Communication Method	Other Communication Method
Performance Plan	Approve	20-Sep-2006	ACKNOWLEDG	20-Sep-2006	15-Oct-2006	Face to Face	

Interim Reviews

[Create Interim Review](#)

Details	Start Date	End Date	Initiator	Status	Update
Show	01-Oct-2006	01-Mar-2007	McLean, James	APPROVED	

The Interim Review showing approved status

The Interim Review is listed as approved.

Congratulations!

You have just approved the interim review.

Closeout Assessments (Rating Officials)

Closeout assessments will be included in future versions of this guide.

Annual Appraisal: Inviting the Employee to Provide a Self-Assessment

Employees are encouraged to complete self-assessments during the interim review and end-of-year review. While NSPS does not require self-assessments, they may be mandated by your organization or Component.

The self-assessment conducted as part of the end-of-cycle review is an opportunity for employees to provide input to you about what they have accomplished during the year. The self-assessment should be completed in time to allow you to consider their input as part of the appraisal process.

The typical steps in the annual appraisal process are as follows. Steps 1-3 are similar to those performed for interim reviews. The step covered in this section is bold and italicized.

- 1. The rating official transfers responsibility to the employee to provide a self-assessment.***
2. The employee provides his or her self-assessment (optional).
3. The rating official reviews the self-assessment (if applicable).
4. The rating official submits his or her assessment and recommended rating for higher-level review and approval.
5. The pay pool panel reviews and approves the appraisal (using an application outside PAA).
6. The rating official changes his or her rating of the employee, if necessary (in PAA).
7. The rating official indicates that the appraisal was communicated to the employee.
8. The employee acknowledges that the appraisal was communicated to him or her.

Follow these steps to invite the employee to provide a self-assessment for an end-of-cycle review:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The *Performance Management As Rating Official* page

1. Select the **Appraise** pencil icon corresponding to the employee record on the *Performance Management As Rating Official* page to go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review

Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings

Employee Name Jeffery Smith

Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE
DD48H50000 01

Position 01206.BUDGET ANALYST.73293.DD48.APPR

Location Rosslyn, US

Occupational Code 0560.Budget Analyst (NSPS)

Pay Plan/Pay Band YA-03

Employee Number 36728

Work Schedule Full-Time

Assignment Status Active Appointment

Pay Pool ID

Setup Details

Appraisal Type Annual Appraisal - NSPS

Appraisal Effective Date 01-Jan-2008

Appraisal Period Start Date 01-Oct-2006

Performance Plan Approval Date 20-Sep-2006

Appraisal Period End Date 30-Sep-2007

Rating Official McLean, James

Change Rating Official

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record

Rating Official Assessment

The **Transfer to Employee** button on the *Rating Official Review* page

2. Select the **Transfer to Employee** button to go to the *Share Appraisal Details with Employee* page.

The **Submit** button on the *Share Appraisal Details with Employee* page

3. Enter comments to the employee in the **Notification Message to Employee** field, inviting the employee to provide a self-assessment.
4. Select the **Submit** button to return to the *Performance Management As Rating Official* page.

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Transferred	Open					

The *Performance Management As Rating Official* page with confirmation message

Congratulations!

You have just invited the employee to provide a self-assessment for the end-of-cycle review. The annual appraisal has been transferred to your employee for a self-assessment.

Annual Appraisal: Reviewing the Employee's Self-Assessment

After your employee has entered his or her self-assessment, the employee transfers it to you. You then review it as input into the assessment you will submit for the employee.

As described earlier, the typical steps in the annual appraisal process are as follows. The step covered in this section is bold and italicized:

1. The rating official transfers responsibility to the employee to provide a self-assessment for the end-of-cycle review (optional).
2. The employee provides a self-assessment (optional).
- 3. *The rating official reviews the self-assessment (if applicable).***
4. The rating official submits his or her assessment and recommended rating for higher-level review and approval
5. The pay pool panel reviews and approves the appraisal (using an application outside PAA). The rating official changes his or her rating of the employee, if necessary (in PAA)
6. The rating official indicates that the appraisal was communicated to the employee.
7. The employee acknowledges that the appraisal was communicated to him or her.

Follow these steps to review the employee's self-assessment:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

Notifications Appraisals Home Logout Preferences Oracle Help

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The **Notifications** tab on the *Performance Management As Rating Official* page

1. Select the **Notifications** tab on the *Performance Management As Rating Official* page to go to the *Notifications Awaiting Your Attention* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Logged In As McLean, James

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
The appraisal of Smith, Jeffery needs your attention as main appraiser.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)	20-Sep-2006		

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The *Notifications Awaiting Your Attention* page

2. Select [The appraisal of \[Employee name\] needs your attention as main appraiser](#) to go to the *Information* page.

Department of Defense

Home Logout Preferences Oracle Help

Information

This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. Close

From Smith, Jeffery
To McLean, James
Sent 20-Sep-2006 19:24:16
ID 127721

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments

I have provided my self-assessment. Please take it into consideration for my end-of-cycle review.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Related Applications


[Update Action](#)

Return to Worklist Close

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Employee notification comments and [Update Action](#) on the *Information* page

3. Review your employee's comments in the *Employee Notification Comments* section.
4. Select [Update Action](#) to go to the *Details: Rating Official* page.



Department of Defense

Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#)

Details: Rating Official [Update](#)

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728	Work Schedule	Full-Time
Pay Pool ID		Assignment Status	Active Appointment

Setup Details

Type	Annual Appraisal - NSPS	Rating Official	McLean, James
Rating Cycle Start Date	01-Oct-2006	Performance Plan Approval Date	20-Sep-2006
Rating Cycle End Date	30-Sep-2007		

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
Rating Official Assessment

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED						
▶ Show	Job Objective 2 - Req Docs	APPROVED						

Employee Self-Assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

[Return to Notification Details](#) [Update](#)

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The employee self-assessment on the *Details: Rating Official* page

5. Review the self-assessment to prepare for the end-of-cycle review.

Congratulations!

You have just reviewed the employee's self-assessment.

Annual Appraisal: Submitting the Assessment and Recommended Rating

An integral part of the performance management process is your assessment of your employee's performance. This written annual assessment captures your employee's accomplishments during the appraisal period.

You also produce a recommended rating that is sent to a higher-level reviewer for review and approval. Once approved, it is sent directly to the pay pool manager for pay pool panel review.

When an appraisal is sent to the pay pool manager, it leaves the PAA and goes to another application.

As described earlier, the typical steps in the annual appraisal process are as follows. The step covered in this section is bold and italicized:

1. The rating official transfers responsibility to the employee to provide a self-assessment for the end-of-cycle review (optional).
2. The employee provides a self-assessment (optional).
3. The rating official reviews the self-assessment (if applicable).
- 4. *The rating official submits his or her assessment and recommended rating for higher-level review and approval.***
5. The pay pool panel reviews and approves the appraisal (using an application outside PAA). During the pay pool panel's appraisal reconciliation process, the panel may ask the rating official to modify his or her rating of the employee.
6. The rating official indicates that the appraisal was communicated to the employee.
7. The employee acknowledges that the appraisal was communicated to him or her.

Follow these steps to submit the assessment and recommended rating:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
McLean, James	Smith, Jeffery	01-Jan-2008	20-Sep-2006	Approved	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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The **Appraise** icon on *Performance Management As Rating Official* page

1. Select the **Appraise** icon on the *Performance Management As Rating Official* page to go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review

Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings

Employee Name Jeffery Smith

Position 01206.BUDGET ANALYST.73293.DD48.APPR

Occupational Code 0560.Budget Analyst (NSPS)

Employee Number 36728

Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01

Location Rosslyn, US

Pay Plan/Pay Band YA-03

Work Schedule Full-Time

Assignment Status Active Appointment

Setup Details

Appraisal Type Annual Appraisal - NSPS

Appraisal Period Start Date 01-Oct-2006

Appraisal Period End Date 30-Sep-2007

Rating Official McLean, James

Appraisal Effective Date 01-Jan-2008

Performance Plan Approval Date 20-Sep-2006

Change Rating Official

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record

Rating Official Assessment

The **Update Plan/Appraisal** button on the *Rating Official Review* page

2. Select the **Update Plan/Appraisal** button to go to the *Update Plan/ Appraisal* page.

Department of Defense
Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

[Rating Official Review](#) >

Update Plan/Appraisal

[Cancel](#) [Save and Continue](#) [Apply](#)

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**
 Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**
 Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**
 Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Setup Details

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS** Assignment Number **36728**
 * Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date **20-Sep-2006**
(example: 20-Sep-2006)
 * Rating Cycle End Date **30-Sep-2007**
 Rating Official **McLean, James**
 * Appraisal Effective Date **01-Jan-2008**





Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Select Object: [Approve](#) | [Add Objective](#)

Select All | Select None

Select	Details	Objective Title	Status	Update Details	Optional Weight	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
<input type="checkbox"/>	Show	Job Objective 1 - FY06 Funding	APPROVED								
<input type="checkbox"/>	Show	Job Objective 2 - Req Docs	APPROVED								

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

Rating of Record and Comments

Rating of Record

Rating Official Assessment

Jeffery serves his clients with technical and interpersonal expertise. He spends a good deal of time with his clients. This on-site support translates into high customer satisfaction and very accurate and sensible budget submissions. Jeffery understands that getting his budgets approved means not just crunching the numbers but telling a compelling story about his programs. He is currently the only person in our organization that has a 94% budget approval rate on first time submissions. His customer service ratings are high. His reports are timely and accurate, he keeps me informed of his progress, and he lets me know when he needs my support.

[Cancel](#) [Save and Continue](#) [Apply](#)


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The rating official assessment and **Update Details** icon on the *Update Plan/Appraisal* page

3. Enter your assessment in the **Rating Official Assessment** field.

For each job objective listed, perform the following steps:

4. Select the **Update Details** pencil icon next to the job objective to go to the *Update Job Objective* page.

 **Department of Defense**
Performance Appraisal Application [Home](#) [Logout](#) [Preferences](#)

[Rating Official Review](#) > [Update Plan/Appraisal](#) >

Update Job Objective

Click Add Objective to create objectives against which you measure performance.

* Indicates required field

Placement in Pay Band

Current Base Salary **80979**
Minimum Pay Band Level **74608**
Maximum Pay Band Level **124904**

[Show Strategic Organizational Objectives](#)

* Objective Title
(Enter up to 80 characters)

* Start Date
(example: 20-Sep-2006)

Job Objective Status **APPROVED**

Date Last Modified **20-Sep-2006**

Job Objective
(Limit to 770 characters)

[Need Help to Write Objectives](#)

Working Version Job Objective
(Limit to 2000 characters)

Contributing Factors

- Technical Proficiency [?](#)
- Critical Thinking [?](#)
- Cooperation and Teamwork [?](#)
- Communication [?](#)
- Customer Focus [?](#)
- Resource Management [?](#)
- Leadership [?](#)

[Show Additional Information on Contributing Factors](#)

Optional Weight

Job Objective Rating

[Show Job Objective Rating](#)

[Show Performance Indicators](#)

Contributing Factor Impact

[Show Contributing Factor Impact](#)

[Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating **3**

Adjusted Weight

Weighted Rating (If Used)

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The **Job Objective Rating** and **Contributing Factor Impact** fields on the *Update Job Objective* page

5. Enter the rating for the job objective in the **Job Objective Rating** field.
6. Enter the effect of the contributing factor in the **Contributing Factor Impact** field.

The table below defines the business rules for how the PAA handles certain job objective ratings and contributing factor combinations.

If	Then
A job objective is scored at level 5	The contributing factor impact can be “+1,” but the adjusted rating must equal “5.”
No contributing factors are selected	The contributing factor impact will automatically be auto-populated to “0 Neutral.”
The job objective is rated at level 2	The contributing factor impact can be “-1,” but it will not lower the job objective rating to level 1 (It will stay at Level 2).

[Hide Job Objective Rating](#)

JOB OBJECTIVE RATING	DESCRIPTORS
5	Employee exceeded the assigned job objective at a level of performance equal to, or above, the Level 5 performance indicator.
4	Employee exceeded the assigned job objective at a level of performance above the Level 3 indicator but below the Level 5 performance indicator.
3	Employee met the assigned job objective at a level of performance equal to the Level 3 indicator.
2	Employee met the assigned job objective at a level of performance below the Level 3 indicator level or needed guidance and assistance beyond that described in the Level 3 indicator.
1	Employee failed to achieve the assigned job objective or failed in the performance of a single assignment where such failure had a significant negative impact on accomplishment of the mission or where a single failure resulted in or could result in death, injury, breach of security, or great monetary loss.
NR	Employee did not have an opportunity to perform the job objective because it became obsolete or could not be accomplished due to extenuating circumstances.

[Hide Performance Indicators](#)

Performance Indicators

DEPARTMENT OF DEFENSE NATIONAL SECURITY PERSONNEL SYSTEM (NSPS)

Performance Indicators

Professional/Analytic Pay Schedules (Non- Supervisors)

Band 3

Level 3

Effectively delivered an objective with broad and significant impact that was in

7. Perform any of the following:

If You...	Then...
Need more information on job objective ratings	Select <u>Show Job Objective Rating</u> to display descriptors of each rating level.
Need to hide the information on job objective ratings	Select <u>Hide Job Objective Rating</u> .
Need more information on performance indicators	Select <u>Show Performance Indicators</u> to display descriptors of each indicator.
Need to hide the information on performance indicators	Select <u>Hide Performance Indicators</u> to hide descriptors of each indicator.

8. Choose one of the following actions:

If You...	Then...
Want to update the next job objective	Select the Apply and Update Next button, and then repeat steps 3-7.
Want to update all job objectives	Select the Apply button to go to the <i>Update Plan/ Appraisal</i> page. The Adjusted Rating, Adjusted Weight, and Weighted Rating (if used) fields are read-only and auto-populated based on the entered job objective rating, contributing factor impact, and optional weights. Go to step 9.



Update Plan/Appraisal

[Cancel](#) [Save and Continue](#) [Apply](#)

Employee Name **Jeffery Smith**

Organization **CIVILIAN PERSONNEL
MANAGEMENT SERVICE
DD48H50000 01**

Position **01206.BUDGET
ANALYST.73293.DD48.APPR**

Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)**

Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time**

Assignment Status **Active Appointment**

Pay Pool ID

Setup Details

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS**
 * Rating Cycle Start Date **01-Oct-2006**
 * Rating Cycle End Date **30-Sep-2007**
 Rating Official **McLean, James**
 * Appraisal Effective Date **01-Jan-2008**

Assignment Number **36728**
 Performance Plan Approval Date **20-Sep-2006**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

Select Object: [Approve](#) | [Add Objective](#)

[Select All](#) | [Select None](#)

Select	Details	Objective Title	Status	Update Details	Optional Weight	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
<input type="checkbox"/>	Show	Job Objective 1 - FY06 Funding	APPROVED				3	0	3		
<input type="checkbox"/>	Show	Job Objective 2 - Req Docs	APPROVED				3	0	3		

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

Rating of Record and Comments


Rating of Record **3-Valued Performer**
 Rating Official Assessment

Jeffery serves his clients with technical and interpersonal expertise. He spends a good deal of time with his clients. This on-site support translates into high customer satisfaction and very accurate and sensible budget submissions. Jeffery understands that getting his budgets approved means not just crunching the numbers but telling a compelling story about his programs. He is currently the only person in our organization that has a 94% budget approval rate on first time submissions. His customer service ratings are high. His reports are timely and accurate, he keeps me informed of his progress, and he lets me know when he needs my support.

[Cancel](#) [Save and Continue](#) [Apply](#)

The Update Plan/Appraisal page

9. Review the information on the *Update Plan/ Appraisal* page.
10. Select the **Apply** button to go to the *Rating Official Review* page.



Department of Defense
 Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

Rating Official Review

Transfer to Employee
Update Plan/Appraisal
Submit Recommended Ratings

Employee Name Jeffery Smith	Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE
Position 01206.BUDGET ANALYST.73293.DD48.APPR	Location DD48H50000 01 Rosslyn, US
Occupational Code 0560.Budget Analyst (NSPS)	Pay Plan/Pay Band YA-03
Employee Number 36728	
Work Schedule Full-Time Assignment Status Active Appointment Pay Pool ID	

Setup Details [Change Rating Official](#)

Appraisal Type Annual Appraisal - NSPS	Appraisal Effective Date 01-Jan-2008
Appraisal Period Start Date 01-Oct-2006	Performance Plan Approval Date 20-Sep-2006
Appraisal Period End Date 30-Sep-2007	
Rating Official McLean, James	

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
 2. Proactively provide budget and contracting support to Program Managers.
 3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record **3-Valued Performer**
 Rating Official Assessment **Jeffery serves his clients with technical and interpersonal expertise. He spends a good deal of time with his clients. This o**

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED			3	0	3	
▶ Show	Job Objective 2 - Req Docs	APPROVED			3	0	3	


Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

The **Submit Recommended Ratings** button on the *Rating Official Review* page

11. Select the **Submit Recommended Ratings** button to submit the ratings and go to the *Submit Recommended Ratings: Rating Official* page.



Department of Defense

Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#)

Submit Recommended Ratings: Rating Official

Employee Name **Jeffery Smith**

Position **01206.BUDGET ANALYST.73293.DD48.APPR**

Occupational Code **0560.Budget Analyst (NSPS)**

Employee Number **36728**

Work Schedule **Full-Time**

Pay Pool ID

Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01**

Location **Rosslyn, US**

Pay Plan/Pay Band **YA-03**

Assignment Status **Active Appointment**

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Status	Optional Weight	Adjusted Weight	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED			3	0	3	
▶ Show	Job Objective 2 - Req Docs	APPROVED			3	0	3	

Overall Job Objectives Information

Average Score **3.00**

Rating of Record and Comments

Rating of Record **3-Valued Performer**

Rating Official Assessment

Jeffery serves his clients with technical and interpersonal expertise. He spends a good deal of time with his clients. This on-site support translates into high customer satisfaction and very accurate and sensible budget submissions. Jeffery understands that getting his budgets approved means not just crunching the numbers but telling a compelling story about his programs. He is currently the only person in our organization that has a 94% budget approval rate on first time submissions. His customer service ratings are high. His reports are timely and accurate, he keeps me informed of his progress, and he lets me know when he needs my support.

Component Unique Information

Details to be shared with Employee

Select appraisal components to share with the employee on completion of appraisal.

Additional Details [\(D\)](#)
 Guest Participant Names
 Guest Participant Ratings

Overall Rating
 Overall Comments

Employee Self-Assessment

TIP Provide input that you wish to have considered as part of your performance rating assessment

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

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The **Continue** button on the *Submit Recommended Ratings: Rating Official* page

12. Review the information contained on the *Submit Recommended Ratings: Rating Official* page.

Note the following about calculation of values found in the *Job Objectives*, *Overall Job Objectives Information*, and *Rating of Record and Comments* sections:

If...	Then...
The job objective rating is “1” for an objective	The rating of record is “1,” regardless of the adjusted rating of any other job objective.
The job objective rating for an objective is NR (not rated)	This job objective is not counted when averaging ratings.
No optional weights are used for objectives	The adjusted ratings are divided by the number of job objectives in Approved status to obtain the average score.
The average score is of the form x.51 or higher	The rating of record is calculated by rounding up to the next whole number.
The average score is of the form x.50 or lower	The rating of record is calculated by rounding down to the whole number.
The job objectives are weighted	The weighted ratings are added.

13. Select the **Continue** button to go to the *Give Recommended Ratings: Review* page.

Department of Defense
Performance Appraisal Application

[Home](#) [Logout](#) [Preferences](#)

[Submit Recommended Ratings: Rating Official >](#)

Give Recommended Ratings: Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit. [Cancel](#) [Back](#) [Submit](#)

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**

Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **Rosslyn, US**

Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**

Employee Number **36728**

Work Schedule **Full-Time** Assignment Status **Active Appointment**

Pay Pool ID

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Overall Job Objectives Information

Average Score **3.00**

Rating of Record and Comments

Rating of Record **3-Valued Performer**
Rating Official Assessment **Jeffery serves his clients with technical and interpersonal expertise. He spends a good deal of time with his clients. This o**

Job Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
▶ Show	Job Objective 1 - FY06 Funding	APPROVED			3	0	3	
▶ Show	Job Objective 2 - Req Docs	APPROVED			3	0	3	

Overall Employee Feedback

This year I have created, reviewed, and supported the budgets for 2 major programs within our organization. Given the size and complexity of these programs, this has been my sole focus. I spend 2 to 3 days per week on-site at my program facilities. I provide day-to-day support to them while supporting the mission of my branch. My budget submission and reviews this year have been accepted with no adjustments. My customers are extremely pleased with my support and are

Details to be Shared with Employee

Additional Details [D](#) Overall Rating
 Guest Participant Names Overall Comments
 Guest Participant Ratings

Approvers

Details	Line No	Approver	Approver Type	Order No	Category	Status	Delete
No Approvers							
▶ Add Adhoc Approver							

Comments to Approvers

[Cancel](#) [Back](#) [Submit](#)

The **Submit** button and *Approvers* and *Comments to Approvers* sections of the *Give Recommended Ratings: Review* page

- Verify the default approver for the appraisal who will serve as the higher-level reviewer of this appraisal. The default approver is your immediate supervisor. This is based on information stored in the SSHR hierarchy.

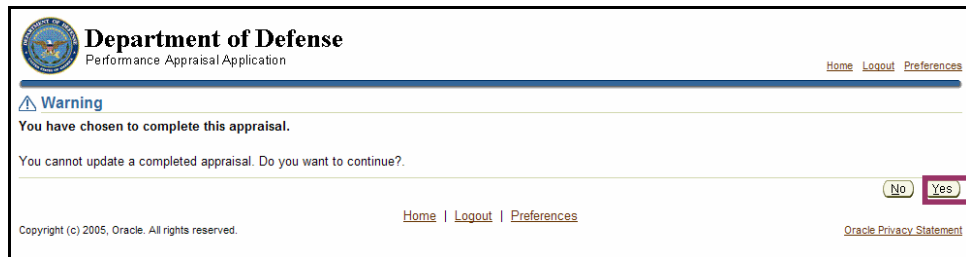
One higher-level review is needed for annual appraisals.



The higher-level review is not the same as the pay pool panel review.

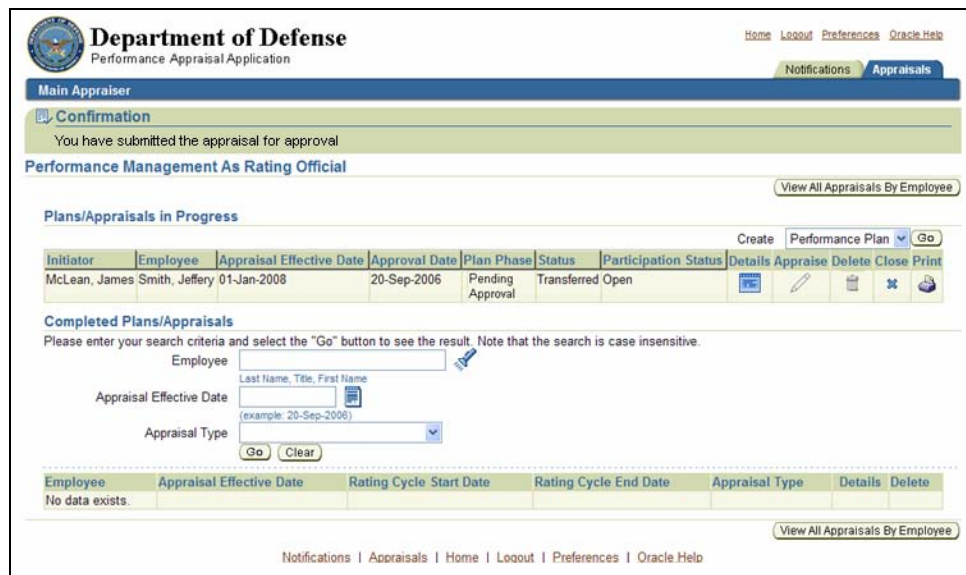
- Enter your comments to the approver in the **Comments to Approvers** field.

16. Select the **Submit** button to display a warning page which informs you that the appraisal is about to be completed.



The **Yes** button selected to complete the appraisal on the *Warning* page

17. Select the **Yes** button to go to the *Confirmation* page.



The *Performance Management As Rating Official* page showing Pending Approval in the *Status* column

The employee's record on the *Performance Management As Rating Official* page reads "Pending Approval" in the *Status* column.

You no longer have ownership of the appraisal; the higher level reviewer has ownership.


No more changes or updates are allowed once you select the **Yes** button. The appraisal has been submitted to the higher level reviewer for review and approval. If it is approved, it will be sent directly to the pay pool manager for review by the pay pool panel. If it is not approved, it will be returned to you for changes.

Congratulations!

You have just submitted your assessment and recommended rating of the employee.

Annual Appraisal: Changing Ratings As a Result of Pay Pool Panel Review

This procedure will be included in future versions of this guide.



Annual Appraisal: Indicating That the Appraisal Was Communicated to the Employee

This procedure will be included in future versions of this guide.



Closing a Notification (Rating Officials)

Once an appraisal has been transferred from your employee to you, it appears as a notification in your *Notifications Awaiting Your Attention* page. The notifications remain in the list of notifications until you close them, which purges them from the system; they do not automatically disappear from the notifications list once you have opened them. This is similar to the way emails work in many email applications.

If you purge the notification, the appraisal can be accessed through the *My Plans/ Appraisals* page.



The notification message from your employee will be purged along with the notification. Ensure that you have opened the notification and read the notification message before you purge it.

You can close a notification by doing the following:

The screenshot shows the 'Department of Defense Performance Appraisal Application' interface. The user is logged in as 'Smith, Jeffery'. The page title is 'Notifications Awaiting Your Attention'. Below the title, there is a table with the following data:

Subject	Sent	Name	Organization	Occupational Code	Update	Delete
Your appraisal has been transferred to you.	20-Sep-2006	Jeffery Smith	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01	0560 Budget Analyst (NSPS)		

At the bottom of the page, there is a copyright notice: 'Copyright (c) 2005, Oracle. All rights reserved.' and a link to the 'Oracle Privacy Statement'.

Notifications on the *Notifications Awaiting Your Attention* page

1. Select Your appraisal has been transferred to you to go to the *Information* page.

Department of Defense

Home Logout Preferences Oracle Help

Information

This notification does not require a response.

The appraisal of Smith, Jeffery needs your attention as main appraiser. Close

From: Smith, Jeffery
 To: McLean, James
 Sent: 20-Sep-2006 14:05:00
 ID: 127715

Summary

Employee Name	Jeffery Smith	Organization	CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
Position	01206.BUDGET ANALYST.73293.DD48.APPR	Location	Rosslyn, US
Occupational Code	0560.Budget Analyst (NSPS)	Pay Plan/Pay Band	YA-03
Employee Number	36728		
Work Schedule	Full-Time	Assignment Status	Active Appointment
Pay Pool ID			

Employee Notification Comments

I have acknowledged the performance plan. It is ready for your approval.

Appraisal Details

Rating Cycle End Date	30-Sep-2007	Rating Cycle Start Date	01-Oct-2006
Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	20-Sep-2006
Appraisal Effective Date	01-Jan-2008		
Rating Official Name	McLean, James		

Close button on the *Information* page

2. Select the **Close** button to purge the notification from your notifications list and return to the *Notifications Awaiting Your Attention* page.

As described in the warning message above, the notification comment from your employee in the *Employee Comments* section is no longer available once you close the notification.

Department of Defense

Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

My Employee Information

On this page, you can access worker development functions and view notification messages.

Notifications Awaiting Your Attention

Subject	Sent	Name	Organization	Occupational Code	Effective Date	Update	Delete
No data exists.							

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Notifications Awaiting Your Attention page with notification purged

Congratulations!

You have just closed a notification.

In future versions of the PAA, you will be able to close a notification on the *Notifications Awaiting Your Attention* page by selecting the **Delete** icon.

Retrieving an Appraisal from an Employee

There may be times when you, as a rating official, have transferred the appraisal record to your employee, but then find that you need to make further edits before your employee starts working on it. It is now under ownership of your employee, so you cannot make any edits to the appraisal unless you retrieve it.

You may also need to retrieve an appraisal if, after transferring the appraisal, you discover that your employee is not available to log on to the PAA and work on the appraisal. This may interfere with meeting a deadline for completing a certain item. In this case, you should retrieve the appraisal and finalize it yourself.

Your employee will receive a notification in their **Notifications** tab after the appraisal is retrieved.



If you retrieve the appraisal, it reverts back to its state *the last time it was transferred*. If your employee has been working on the appraisal since it was transferred to him or her, those changes will be lost.

Follow these steps to retrieve an appraisal:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
Cooper, George	Avery, Frank	01-Jan-2008		Pending	Transferred	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Last Name, Title, First Name

Appraisal Effective Date

(example: 20-Sep-2006)

Appraisal Type

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

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Grayed-out pencil icon and **Details** button on the *Performance Management As Rating Official* page

1. Select the **Details** icon for the appraisal you need to retrieve to go to the *Details: Rating Official* page.

On the *Performance Management As Rating Official* page, note that the **Appraise** pencil icon for this appraisal is gray, meaning that your employee has ownership of it.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences

Details: Rating Official

Retrieve Appraisal

Employee Name: Frank Avery
 Position: 01213.CONTRACT SPEC.73308.DD48.APPR
 Occupational Code: 1102.Contract Specialist (NSPS)
 Employee Number: 36744
 Work Schedule: Full-Time
 Pay Pool ID: [blank]

Organization: CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01
 Location: Rosslyn, US
 Pay Plan/Pay Band: YA-01
 Assignment Status: Active Appointment

Setup Details

Type: Annual Appraisal - NSPS
 Rating Cycle Start Date: 01-Oct-2006
 Rating Cycle End Date: 30-Sep-2007
 Rating Official: Cooper, George
 Performance Plan Approval Date: [blank]

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

The **Retrieve Appraisal** button on the *Details: Rating Official* page

2. Select the **Retrieve Appraisal** button to return to the *Performance Management As Rating Official* page. The pencil icon is now active, indicating that you have ownership of the appraisal.

Department of Defense
Performance Appraisal Application

Home | Logout | Preferences | Oracle Help

Details: Rating Official >

Performance Management As Rating Official

[View All Appraisals By Employee](#)

Plans/Appraisals in Progress

Create Performance Plan [Go]

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
Cooper, George	Avery, Frank	01-Jan-2008		Pending	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee: [Last Name, Title, First Name] [Pencil icon]
 Appraisal Effective Date: [example: 20-Sep-2006]
 Appraisal Type: [dropdown]
 [Go] [Clear]

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

[View All Appraisals By Employee](#)

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The *Details: Rating Official* page with the **Appraise** pencil icon now active

Congratulations!

You have just retrieved an appraisal.

Changing the Rating Official Assignment

As a rating official, there may be times when you need to change your employee's rating official assignment to another rating official. This may happen if you or your employee change positions and you no longer supervise the employee or if you are temporarily unavailable to perform rating official functions (for example, due to illness or vacation).

A rating official assignment can only be changed to another person who is identified as a rating official in the PAA. Like the former rating official, the new rating official should have first-hand knowledge of the employee's work.

Follow these steps to change a rating official assignment:

Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Main Appraiser

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
Cooper, George	Avery, Frank	01-Jan-2008		Pending	Ongoing	Open					

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Last Name, Title, First Name

Appraisal Effective Date

(example: 20-Sep-2006)

Appraisal Type

Go Clear

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

View All Appraisals By Employee

Notifications | Appraisals | Home | Logout | Preferences | Oracle Help

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The *Performance Management As Rating Official* page

1. Select the **Appraise** pencil icon for the employee whose rating official you want to change on the *Performance Management As Rating Official* page to go to the *Rating Official Review* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review

Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings

Employee Name **Frank Avery** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**
 Position **01213.CONTRACT** Location **DD48H50000 01**
 Occupational Code **SPEC.73308.DD48.APPR** Location **Rossllyn, US**
 Occupational Code **1102.Contract Specialist (NSPS)** Pay Plan/Pay Band **YA-01**
 Employee Number **36744**

Work Schedule **Full-Time** Assignment Status **Active Appointment**
 Pay Pool ID

Setup Details

Appraisal Type **Annual Appraisal - NSPS** Appraisal Effective Date **01-Jan-2008**
 Appraisal Period Start Date **01-Oct-2006** Performance Plan Approval Date
 Appraisal Period End Date **30-Sep-2007**
 Rating Official **Cooper, George**

Change Rating Official

Relevant Organizational Mission/Strategic Goals

1. Provide responsive, best value supplies and services to customers.
2. Proactively provide budget and contracting support to Program Managers.
3. Streamline and improve processes to support multi-million dollar contracting efforts.

Rating of Record and Comments

Rating of Record
 Rating Official Assessment

The **Change Rating Official** button on the *Rating Official Review* page

2. Select the **Change Rating Official** button to go to the *Change Rating Official* page.

Department of Defense
Performance Appraisal Application

Home Logout Preferences

Rating Official Review >

Change Rating Official

If you change rating official after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal. If you change rating official after completing some sections of the appraisal, you remain listed as an appraiser and any information you enter is retained. However, you can make no further changes to the appraisal.

* Indicates required field

Appraisal Type **Annual Appraisal - NSPS**
 Period Start Date **01-Oct-2006**
 Period End Date **30-Sep-2007**
 Appraisal Date **01-Jan-2008**
 Next Appraisal Date
 Assignment Number **36744**

* Rating Official

Cancel Apply

Cancel Apply

Home | Logout | Preferences

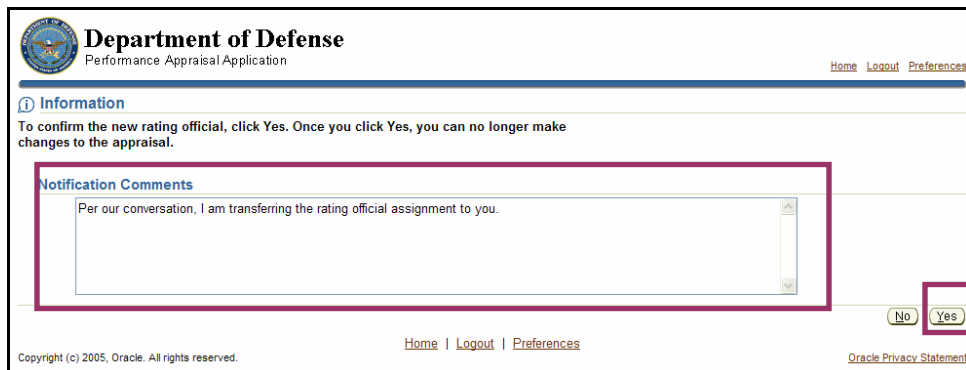
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The **Apply** button and the **Rating Official** field on *Change Rating Official* page

3. Enter the name of the rating official you wish to change to in the **Rating Official** field, as follows:


If...	Then...
You know the person's name as it is stored in SSHR	Type it into the field, in [last name], [first name] format
You wish to search by full name, occupational code, or organization	<ol style="list-style-type: none"> 1. Select the Find icon to search for the name using the <i>Search and Select</i> dialog box. 2. Enter the name of the person in the field to the right of the Search By field. 3. Select the Go button to display a list of names. 4. Select the Select radio button to the left of the name you need. 5. Select the Select button to insert the name in the field.

4. Select the **Apply** button to go to the *Information* page.



The **Notification Comments** field and the **Yes** button on the *Information* page

5. Enter your notification comments to the new rating official in the **Notification Comments** field.
6. Select the **Yes** button to confirm your change and go to the *Performance Management As Rating Official* page.


Department of Defense
 Performance Appraisal Application

[Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

[Notifications](#) | **Appraisals**

Main Appraiser

Confirmation

You have successfully changed the rating official for the appraisal.

Performance Management As Rating Official [View All Appraisals By Employee](#)

Plans/Appraisals in Progress

Initiator	Employee	Appraisal Effective Date	Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
No data exists.											

Create

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee

Appraisal Effective Date

Appraisal Type

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

[View All Appraisals By Employee](#)

[Notifications](#) | [Appraisals](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

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The Performance Management As Rating Official page

Congratulations!

You have just changed the rating official assignment.

Appendix A

Additional Information about the PAA

What is Oracle® Self-Service Human Resources?

Self-Service Human Resources (SSHR) is the latest evolution in Defense Civilian Personnel Data System (DCPDS) applications. It provides the automated tool for employees, supervisors, and managers to participate as stakeholders in the Human Resources (HR) arena via a Web browser. SSHR allows managers, supervisors, and employees to access, view, and update personnel information relating to appointment, position, person, benefits, awards and bonuses, and performance 24 hours a day, 7 days a week.

What is a self-service hierarchy?

A self-service hierarchy is the mechanism used to create the one-to-one relationships necessary to identify the supervisory chain within organizations. The self-service hierarchy must be established to provide the rating official with access to their employees' records. Until the hierarchy is established in the Components' production databases, the appraisal menu item will not be available on the navigation menu.

Military supervisors will also be established in the self-service hierarchy.

How will I get my user IDs and passwords to access SSHR?

Component systems administrators will establish user IDs and passwords for all users requiring access to the Appraisal module.

How does the PAA relate to SSHR?


You access PAA through SSHR using the user ID and password provided. You will be required to change the default password immediately after you log on for the first time.

There are rules you need to know about creating passwords. The most important is to never give your password to anyone. Giving your password to someone is equivalent to giving them all your highly personal information. You must be assigned SSHR responsibilities in DCPDS to access the Appraisal module. The supervisor or manager is assigned "My Workplace" responsibility and you are assigned "My Biz" responsibility.

Rating officials and employees, respectively, will access the PAA by selecting the following items after logging on to SSHR:

- Rating Official Navigation: [My Workplace](#) → [NSPS Appraisals \(My Workplace\)](#)
- Employee Navigation: [My Biz](#) → [NSPS Appraisals \(My Biz\)](#)

Rating officials will access their personal appraisal through [My Biz](#).







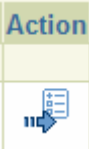

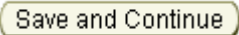
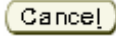



Other PAA Documentation and Training


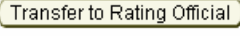
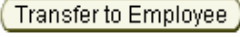



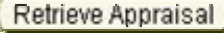

This document is intended mainly as a reference. PAA training is being developed. To see the available training, go to <http://www.cpms.osd.mil/nsps/training.html> .

There is no help information available from PAA screens.

Appendix B

Commonly Used Icons and Buttons

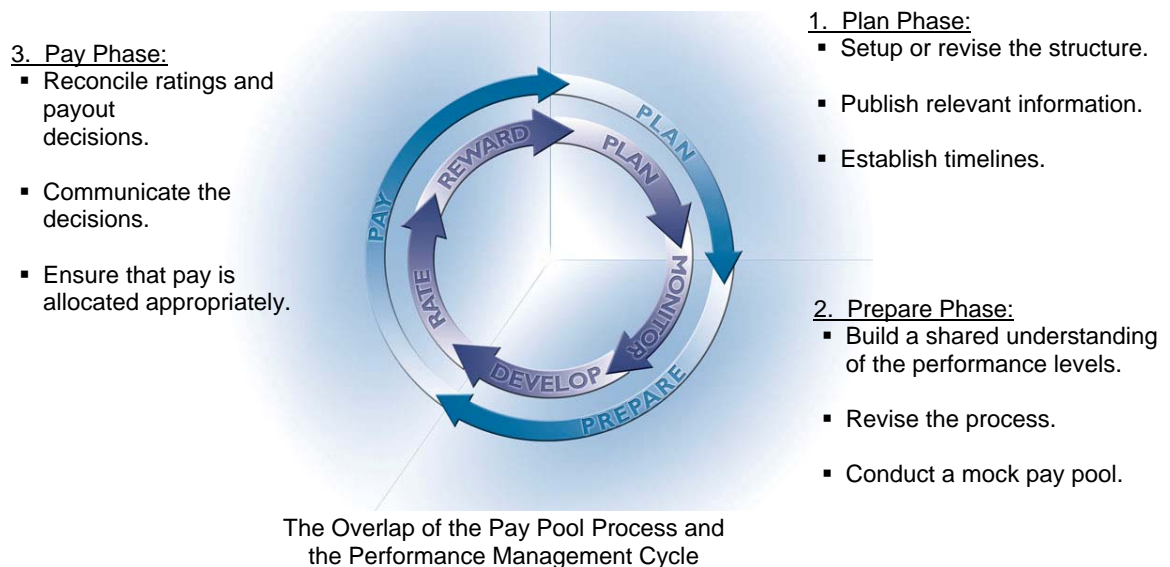
Icon	Description
	Selecting the Find icon opens a Find window.
	If the Pencil icon is highlighted, you are able to update information related to your appraisal.
	If the Pencil icon is grayed out, you are unable to update information related to your appraisal.
	Selecting the Delete icon will remove data from the system permanently.
	Selecting the Action icon initiates an update action for an employee listed on the <i>Create Performance Plan: Employees in Hierarchy</i> page.
	Selecting the Details icon displays read-only information. The Details icon displays a different set of information depending on which page it is located.
	Selecting the Save and Continue button saves changes. You can continue to work on the same page or navigate to other functions.
	On some pages, selecting the Cancel button will take you to the previous page. On other pages, you will receive the following warning. Selecting Yes will take you to the previous page (make sure the changes have been saved).
	
	The process bar orients you to where you are in the appraisal process in PAA.
	Selecting the Continue button takes you to the next page.

Icon	Description
	Selecting the Back button takes you back one page.
	Selecting the Transfer to Rating Official button transfers the appraisal to the rating official.
	Selecting the Transfer to Employee button transfers the appraisal to the employee.
	Selecting the Apply button applies all changes.
	Selecting the Print icon allows you to print the DD 2906 form with completed information. At this time, only the performance plan will be printed, and only approved job objectives will appear on the form.
	Selecting the Calendar icon allows you to select a date for updating. This is associated with date areas only.
Show All Details	Selecting Show All Details expands all sections.
Hide All Details	Selecting Hide All Details collapses all sections.
	Selecting the Retrieve Appraisal button retrieves an appraisal that has been transferred to the employee. The employee receives a notification of this.
	The Close Performance Plan/Appraisal button is only available to rating officials. Selecting it inactivates the appraisal and removes it from your Plans/Appraisals in Progress list. It does not permanently delete it from the system.

Appendix C

Overview of the Performance Management System and Pay Pool Process

NSPS is a pay-for-performance system designed to compensate and reward employees based on individual and organizational performance and contribution. Performance management in NSPS consists of the integration of two processes: performance management and pay pool management. The performance management cycle consists of five phases: Plan, Monitor, Develop, Rate, and Reward. The pay pool process consists of three phases: Plan, Prepare, and Pay. The circles below illustrate the relationship between the timing of the phases of the performance management cycle and the pay pool process.



The *Plan phase* is the first phase of both the performance management cycle and the pay pool process. During the performance management cycle's Plan phase, rating officials and employees identify and agree on performance objectives for the coming year. In addition to agreeing on what work will be done during the year, rating officials and employees come to an understanding on how the work should be done and what are the most important attributes and behaviors against which the work will be evaluated. These attributes and behaviors are called contributing factors. The objectives and contributing factors are captured in each employee's performance plan, which is created and stored in the PAA online tool.

During the *Plan phase* of the pay pool process, pay pool managers establish the structure of the pay pool, including identifying the relationship between rating officials and employees. This relationship must be established within the online tools in order for the rating officials to enter the job objectives and for employees to approve them in the system.

During the *Monitor and Develop phases* of the performance management cycle, the rating official observes and discusses the quality of work with the employee. Although NSPS encourages holding ongoing informal conversations about performance, it requires that rating officials hold at least one formal conversation during the time between finalizing the performance plan and beginning to rate the employee. During this interim review conversation, the rating official and employee should discuss what has been accomplished so far in the year, how it has been accomplished, how performance can be improved, and how the employee can develop additional skills. The results of the interim review conversation are captured in the employee's performance plan contained in the PAA.

Towards the end of the performance management cycle, the *Rate phase* begins. The phase starts with the employee writing a self-assessment of the work accomplished during the year. This self-assessment aids the rating official in evaluating the employee's performance for the year. The self-assessment is an opportunity to advocate on one's own behalf and to place one's work in the context of the established goals for the year. Therefore, employees should write self-assessments with great care. To ensure that the information is captured, the self-assessments are stored in the PAA. The performance management cycle's *Rate phase* concludes with the rating official making recommendations for the employee's performance rating, share allocation, and payout distribution and providing a narrative to support the recommended rating. This information is also stored in the employee's performance plan in the PAA.

The *Pay phase* of the pay pool process begins with a review of the recommendations from the rating officials. Pay pools are groups of employees who work in an organization and share funding for performance payouts. Pay pool panels are groups of managers or supervisors who gather to review employee evaluations to ensure that the same standards for evaluating performance are applied, and that performance payouts are consistent with ratings. Should changes be necessary to ensure fairness, pay pool panel members notify the rating official, who then changes the rating in the PAA.

When final decisions are made, the rating official communicates the results, including the final rating, share allocation, and payout distribution, to the employee. This occurs at the end of the *Pay phase* of the pay pool process that corresponds with the *Reward phase* of the performance management cycle.

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