Enterprise Human Resources Information Systems (EHRIS)

User Guide

MyPerformance
(DoD Performance Management and Appraisal Program)

Employee Guide

March 7, 2016

Serving Those Who Serve Our Country

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Introduction

Purpose

The purpose of this guide is to provide employees, step-by-step instructions on how to create a performance plan in MyPerformance.

MyPerformance helps employees manage performance. The tool streamlines and automates performance management processes and documentation requirements to make it easier and more efficient to track and monitor performance.

Who Should Use This Guide?

This user guide is for employees.

Background

Who to Call For Help?

If you have a question regarding your login, access to other tools within MyBiz+ pages, or system functionality, please contact your Component Help Desk. The Component Help Desk list is located at the bottom of the DCPDS Portal page at https://compo.dcpds.cpms.osd.mil.

Navigation Tips

Use Control and mouse click (Ctrl + Click) on the hyperlinked words to view associated screenshots or move throughout the document. Use the keyboard shortcut alt and left arrow (Alt + left arrow) to go back to where you were.

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

How the Guide Is Structured

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

Performance Management Appraisal Procedures for Employees

- Shows employees how to work in the tool. Work is divided into tasks that are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Performance Management Appraisal Procedures for Rating Officials

- Shows rating officials how to work in the tool. Work is divided into tasks, which are presented under major headings with step-by-step procedures and screen shots. A brief description of the purpose and work context of both tasks and procedures is included.

Transfer, Sharing, and Ownership of Appraisal Records

MyPerformance allows employees and rating officials to transfer performance plans back and forth. Both roles can review the performance plan online, make changes 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 has ownership of the performance plan, the rating official may retrieve it in order to complete the plan or make changes.

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 input 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, the employee:

- 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.

Cutting, Copying and Pasting

You can cut or copy and paste from another document. Be aware that special characters may appear incorrectly as you paste your text into the field. 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. Take the time to review the text closely after you have saved it, make any changes and save again.

Performance Management Appraisal Procedures –What Employees Need to Know

MyPerformance stores, organizes, and routes information regarding all aspects of the performance management process, including performance plans, progress reviews, and final performance appraisal discussions. This section focuses on the employee's use of the system and explains how to use *MyPerformance* to enter and edit your own performance plan.

At the beginning of the rating cycle (normally April 1 of each year), you or your rating official (usually your immediate supervisor) initiate a new performance plan.

Performance plans include a maximum of ten performance elements and related performance standards. All elements are critical and each performance plan must have at least one element.

There are two approaches to creating a performance plan:

- Your rating official notifies you to create the plan, and you create it.
- Your rating official creates the plan.

You and your rating official should communicate about your performance expectations in creating and finalizing your performance plan. In order to draft your performance plan, you need certain information such as the appraisal period start, end, and effective dates and your relevant organizational mission/strategic goals. If you do not know this information, check with your rating official before you begin.

Getting Started - About DoD Performance Management Appraisal Tool

If you are new to the ***MyBiz+*** self-service tool, pages 6 through 11 provide screen shots and descriptions of the information on the screens to help in familiarizing you with the tool. However, should you wish to get started right away, go directly to page 12 and start with 'Creating a Performance Plan (Employee).'

Accessing the DoD Performance Management Appraisal Tool

To access the DoD enterprise suite of Human Resources (HR) tools every user must enter the portal. The information provided below directs the user to the portal link and walks the user through the access process with follow on directions to the DoD Performance Management Appraisal Tool.

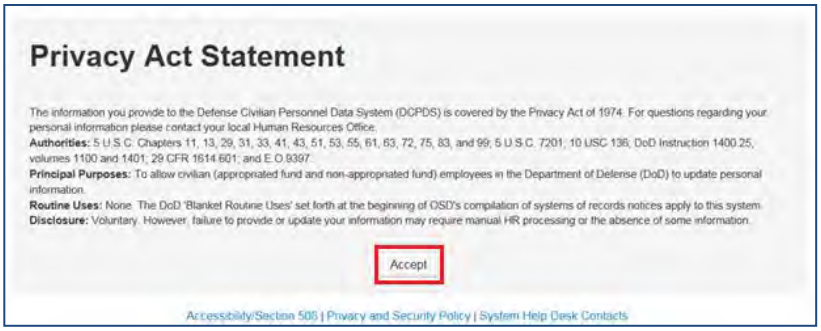
DCPDS Portal

To access ***MyPerformance,*** you must first log in to the ***DCPDS Portal*** at https://compo.dcpds.cpms.osd.mil using your Smart Card (CAC/PIV) or non-Smart Card (non-CAC User ID) and password. From there you will be directed to ***MyBiz+***. The **Performance Management and Appraisal** link is located in *Key Services*.

Log on with your Smart Card (CAC/PIV) or non-Smart Card (non-CAC User ID) and password using the applicable login button on the ***DCPDS Portal*** page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.

Figure 1 - DCPDS Portal Login Page - Certificate Selection

Read the ***Privacy Act Statement*** and select the **Accept** button.



Privacy Act Statement

The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office.
Authorities: 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, volumes 1100 and 1401; 29 CFR 1614.601; and E.O.9397.
Principal Purposes: To allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal information.
Routine Uses: None. The DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system.
Disclosure: Voluntary. However, failure to provide or update your information may require manual HR processing or the absence of some information.

Accept

Accessibility/Section 508 | Privacy and Security Policy | System Help Desk Contacts

Figure 2 - Privacy Act Statement

Employee Access to MyPerformance

From the ***MyBiz+*** home page, select *MyPerformance* under **Key Services**.

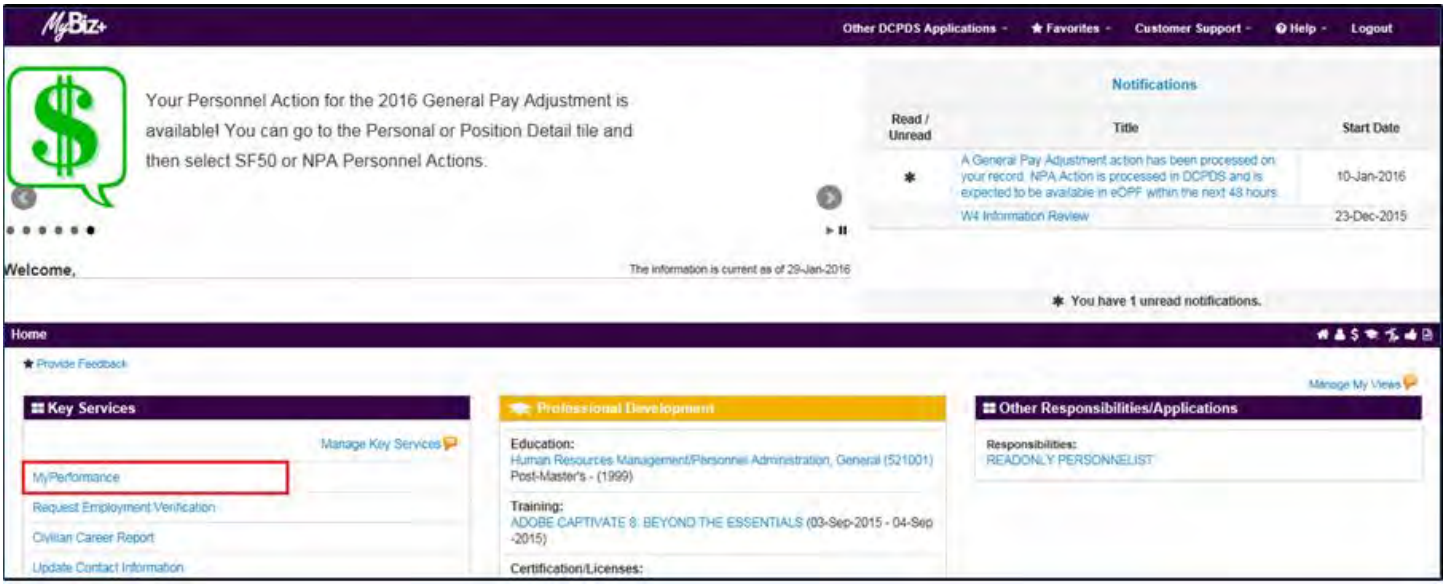


Figure 3 - *MyBiz+* Home Page

You are now on the *MyPerformance Main Page* where you can create, update, and view your performance plan/appraisal.

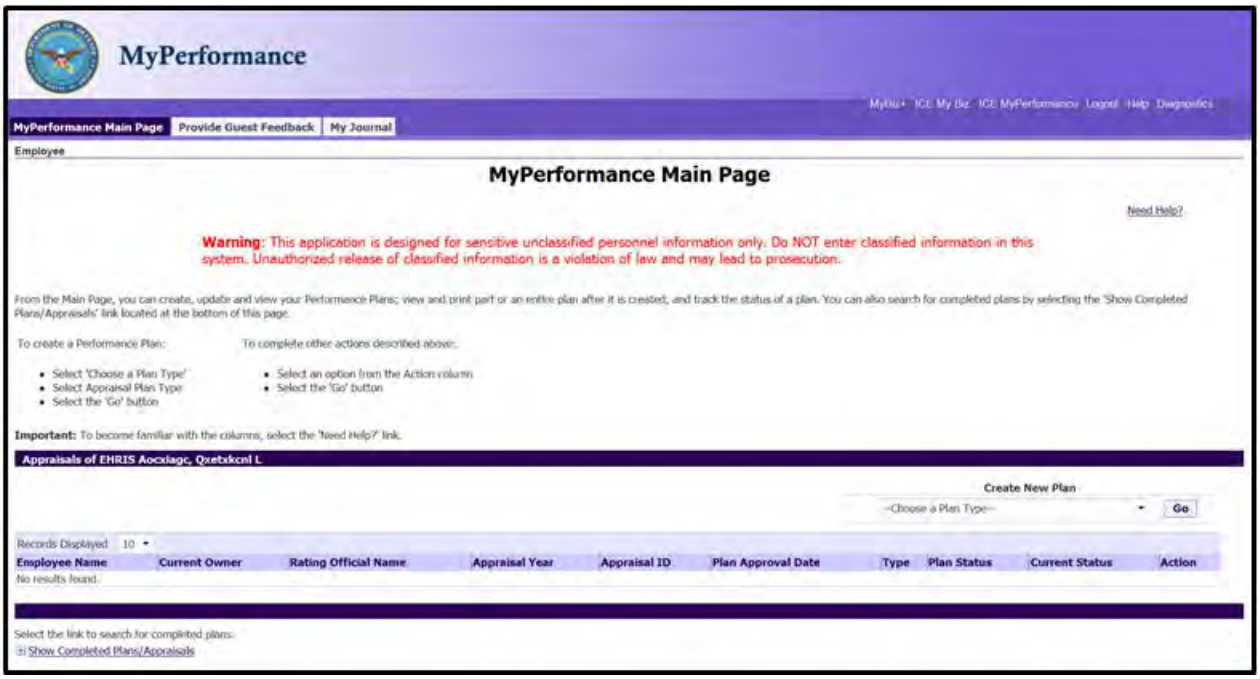


Figure 4 - *MyPerformance Main Page*

MyPerformance Main Page

The *MyPerformance Main Page* tab is the default page for both employees and rating officials. From this main page you can create, update, view your performance plan/appraisal, and search for completed plans/appraisals. Two additional tabs are available from the main page:

1) Provide Guest Feedback tab used if you are identified to provide performance input.
2) MyJournal tab is for employees only – to keep track of your performance accomplishments.

Provide Guest Feedback

The *Provide Guest Feedback* tab is if you have been invited to provide feedback as a guest participant for employee(s). Your role in the appraisal may be as a guest rater or guest reviewer.

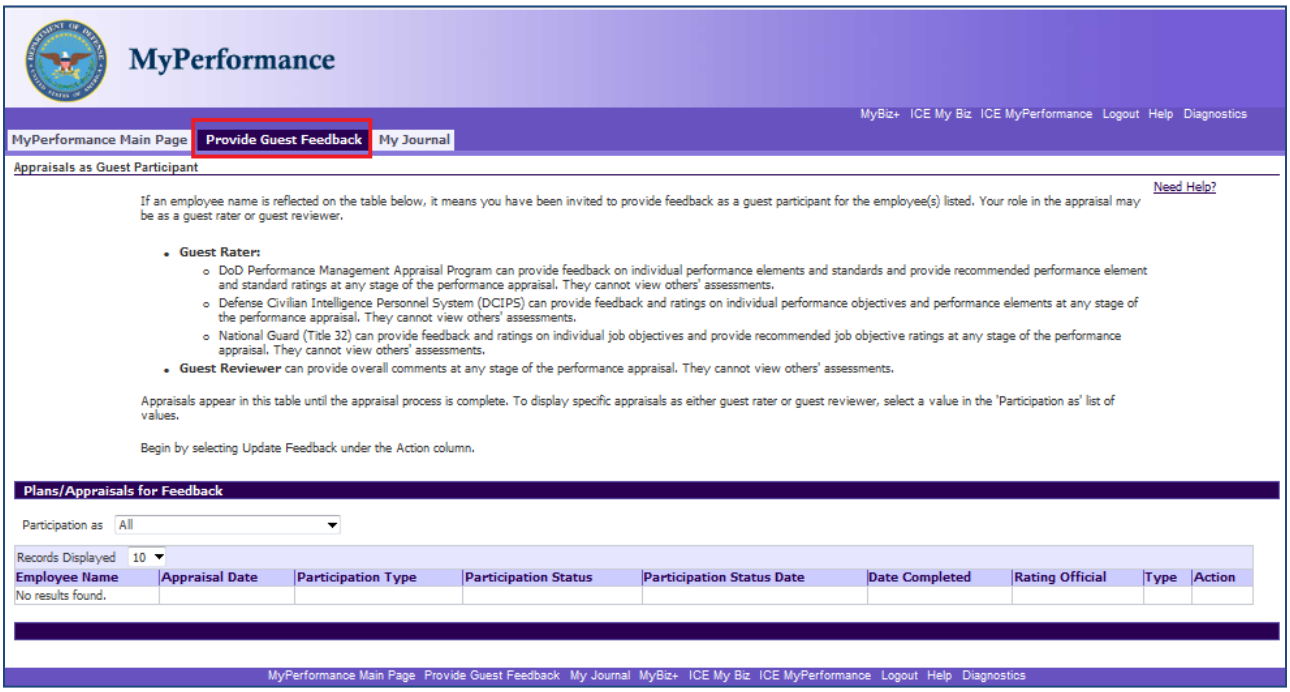


Figure 5- Provide Guest Feedback Page

MyJournal

The *MyJournal* tab is available for employees to track job accomplishments during the appraisal period to assist in developing employee input at the end of the appraisal cycle. Only employees can see their *MyJournal* entries.

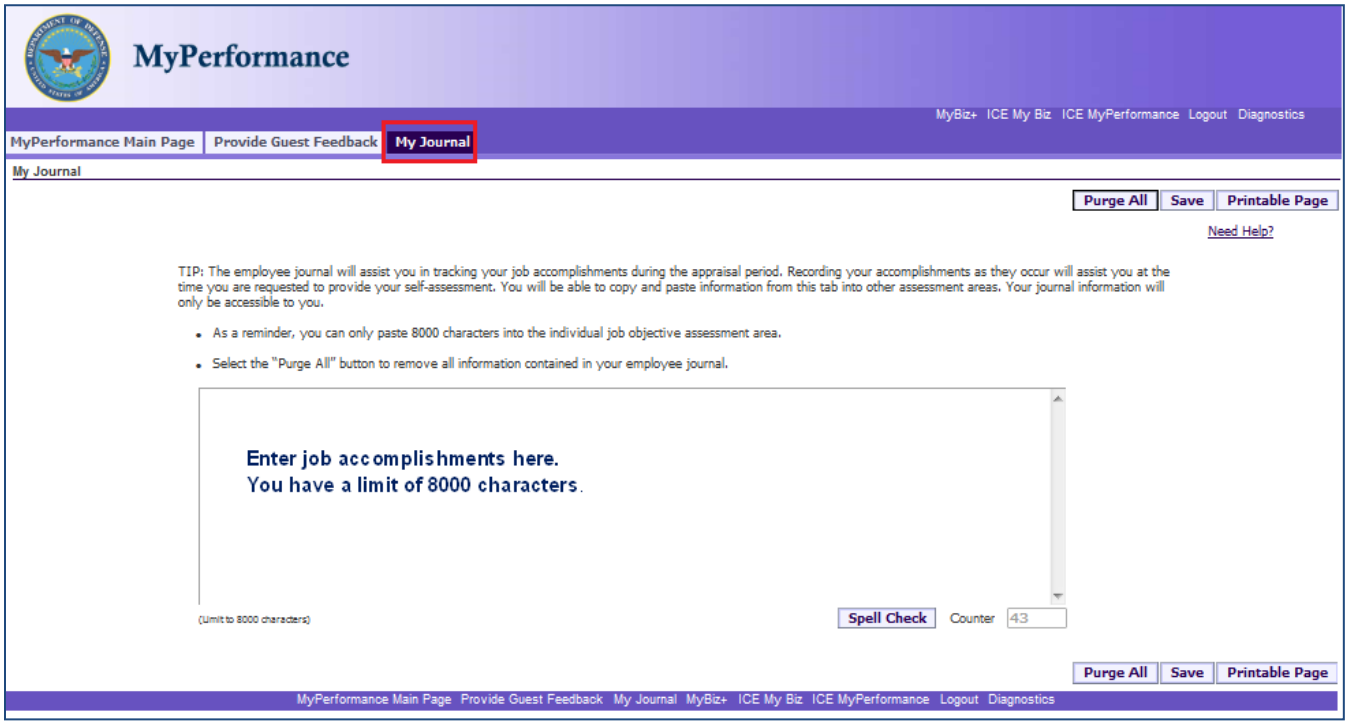


Figure 6 - *MyJournal* Page

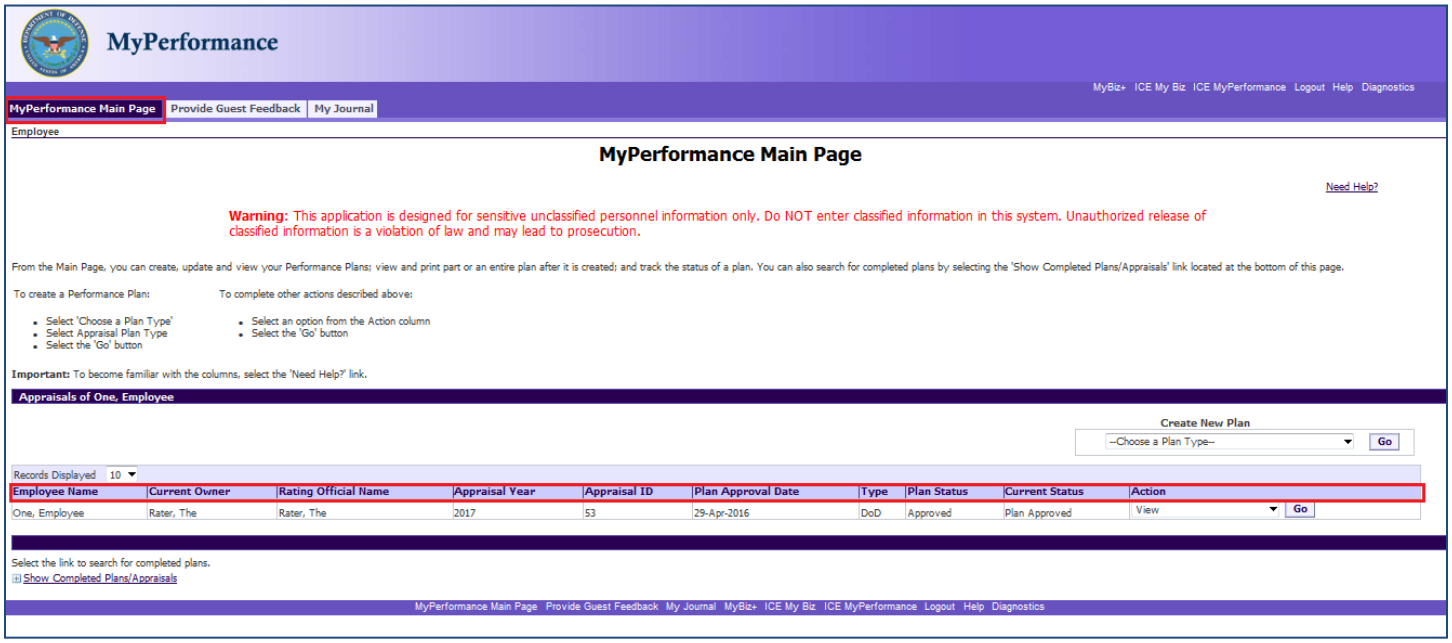
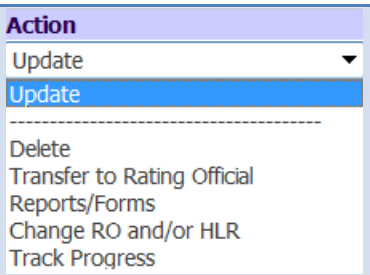


Figure 7 - *MyPerformance Main Page* - Column Area

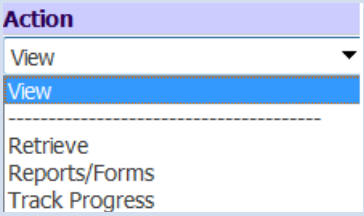
Table 1 – *MyPerformance Main Page* - Column Headings and Description

The table below provides a description of each column heading under the Appraisal bar on the *MyPerformance Main Page* screen.

Column Headings	Description
Employee Name	Name
Current Owner	Person who has update capability to the performance plan. The plan may be owned by employee, rating official or higher level reviewer
Rating Official Name	Name of your rating official
Appraisal Year	Performance appraisal cycle year
Appraisal ID	An automated number assigned to a plan when created
Plan Approval Date	Date performance plan was approved
Type	Identifies the three types of plans that may be created: • **DoD** – DoD Performance Management Appraisal Program (DoD employees will select this option.) • **DCIPS** - Defense Civilian Intelligence Personnel System • **NG** – National Guard (Title 32)
Plan Status	Indicates the status of your performance plan: • **Approved** – Performance plan has been approved and communicated to the employee • **Modified** – An approved performance plan has been changed and the changes have not been approved • **Pending** – Performance plan has been initiated and saved but not approved
Current Status	Indicates progression through the steps of the performance management process • **Plan in Progress** – Performance plan has been started but not approved or original performance plan was approved and performance elements and standards have been modified but not reapproved • **Plan Approved** – Performance plan has been approved (or modified performance elements and standards have been reapproved) • **Progress Review in Process** – Progress review has been created but not approved • **Progress Review Completed** – Progress review has been approved by rating official and acknowledged by employee • **Narrative Statement in Progress** – Narrative statement has been started but not approved • **Narrative Statement Completed** – Narrative statement has been completed by rating official and acknowledged by employee • **Annual Appraisal in Progress** – Annual Review has been created and transferred to rating official but not approved
Action	You are the current owner of the performance plan/appraisal



You are not the current owner of the performance plan/appraisal



Available actions are determined by ownership and status

- **Update** – Current owner and allows you to update plan/appraisal
- **Delete** – You can only delete a pending plan that you created and has not been transferred to the rating official
- **Transfer to Rating Official** – Routes plan/appraisal to rating official
- **Reports/Forms** – To print or save reports and/or forms
- **Change RO and/or HLR** – Change current **R**ating **O**fficial or **H**igher **L**evel **R**eviewer for plan/appraisal
- **Track Progress** – Displays status of your performance plan throughout the performance cycle
- **View** – Only allows you to view performance plans
- **Retrieve** – If the performance plan has not been opened by the rating official, you can retrieve it from rating official

Performance Plans

Creating a Performance Plan (Employee)

Follow these steps to create a performance plan.

1. On the *MyPerformance Main Page*, from the *Create New Plan* drop-down menu, select DoD Performance Management Appraisal Program. (See Figure 8 – ***MyPerformance** Main Page*) Select the **Go** button to display the *Create Performance Plan* page.

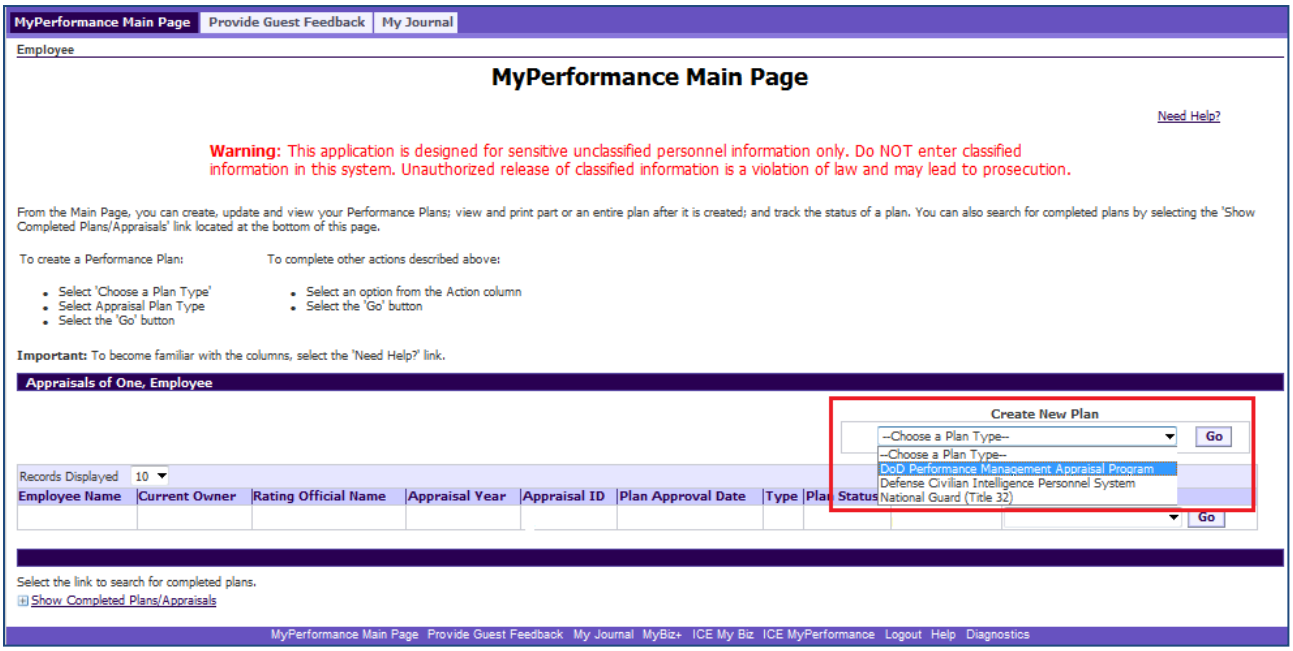


Figure 8 - *MyPerformance Main Page*

2. Review the data in Setup Details area identified in Figure 9 below, and make any necessary changes to the default values. 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. The asterisk (*) on the screen indicates that the field is required.

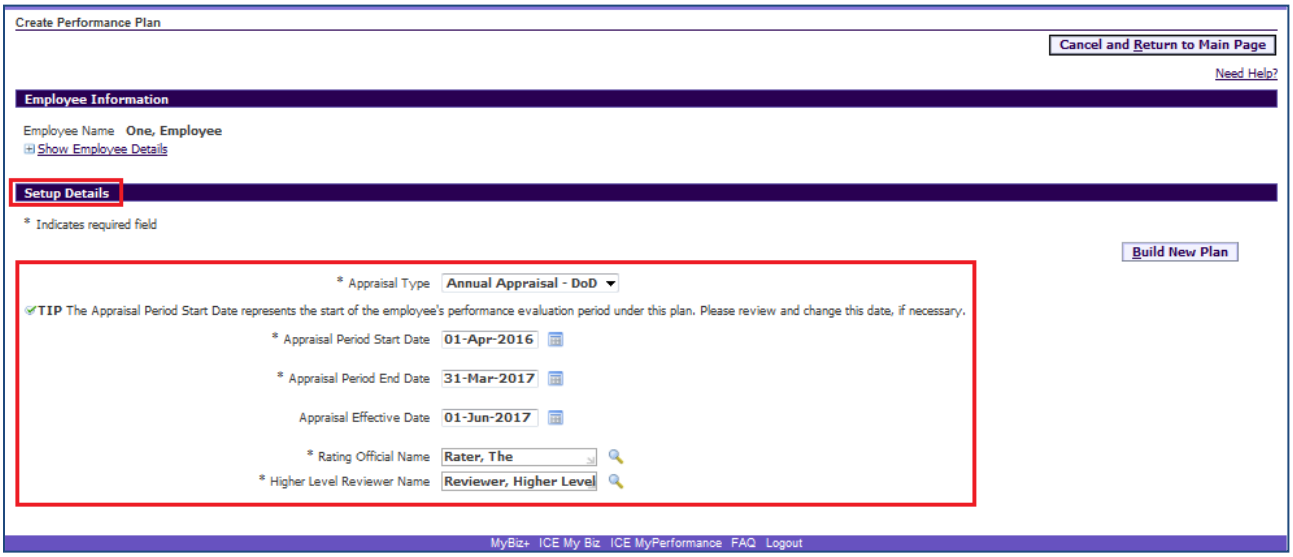


Figure 9 - *Create Performance Plan*

Table 2 – Create Performance Plan page - Setup Details fields and descriptions
This table provides a description of each of the **Setup Details** area fields.

Field	Description
***Appraisal Type**	The Annual Appraisal – DoD option appears by default.
***Appraisal Period Start Date**	The cycle start date defaults to 01-Apr-YYYY
***Appraisal Period End Date**	The cycle end date defaults to 31-Mar-YYYY
Appraisal Effective Date	The appraisal effective date defaults to 01-Jun-YYYY
***Rating Official**	This field is auto-populated based on information stored in the hierarchy
Higher Level Reviewer Name	This field is auto-populated based on information stored in the hierarchy

3. Select the **Build New Plan** button to go to the *Plan* > *Plan Details* page.

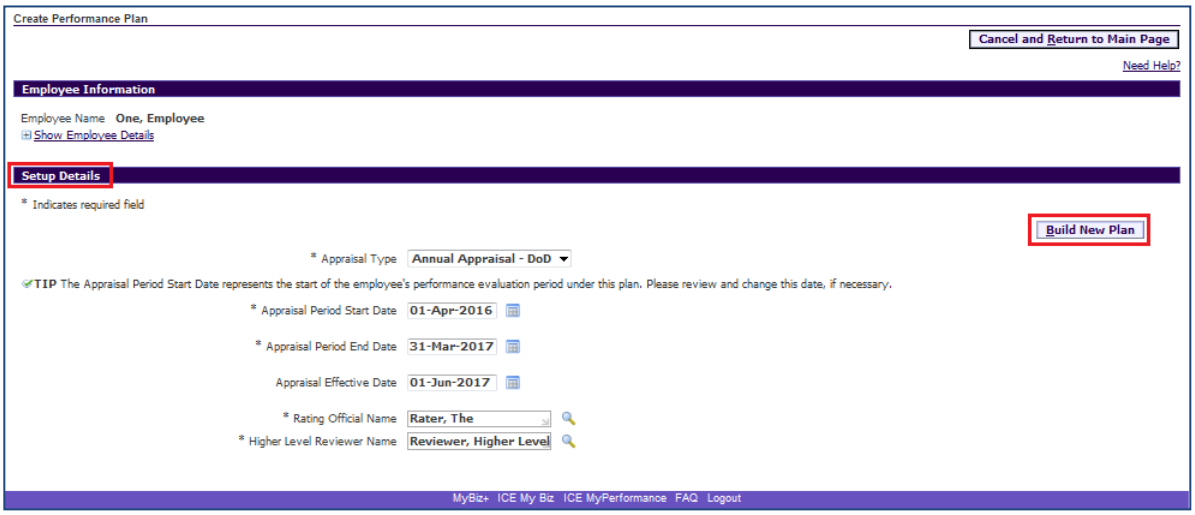


Figure 10 - *Create Performance Plan*

4. The *Plan Details* page is displayed in Figure 11 below. On this page you can review the plan details once more and you may make necessary changes if needed. If you need help on this page, select the Need Help? link. The DoD Performance Management Appraisal Program is tab driven. You can use the tab navigation to go to another part of the performance plan (i.e., Mission Goals, etc.) or select the **Save and Continue** button.

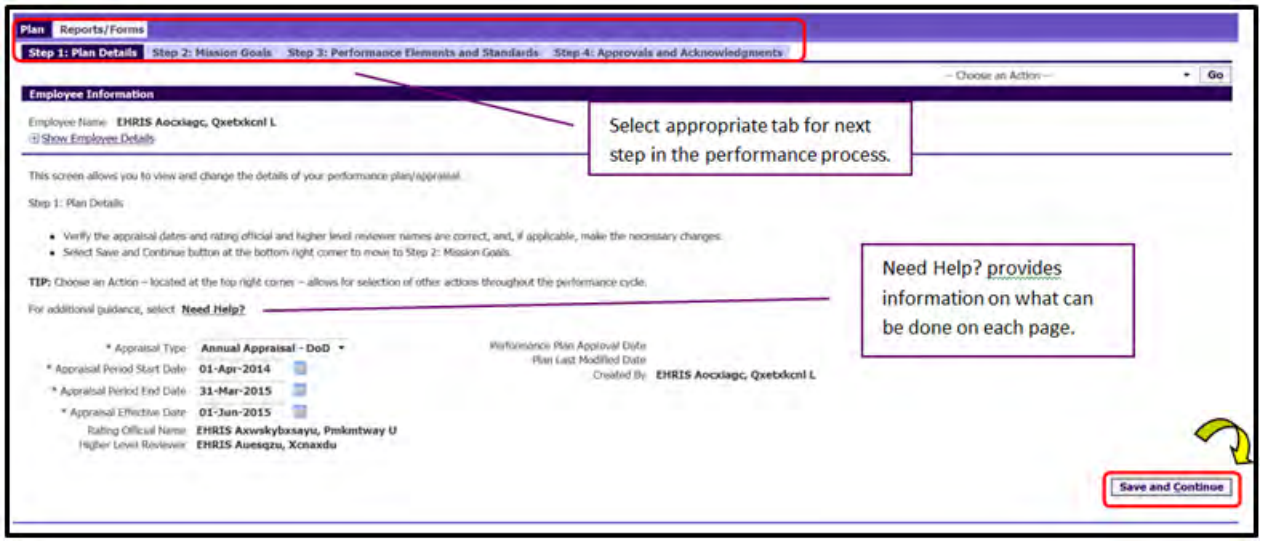


Figure 11 - *Plan* > *Plan Details* Page

5. The *Mission Goals* page is displayed. Enter your organization's goals so they align your performance elements and standards with your organization's goals and priorities and select the **Save and Continue** button.

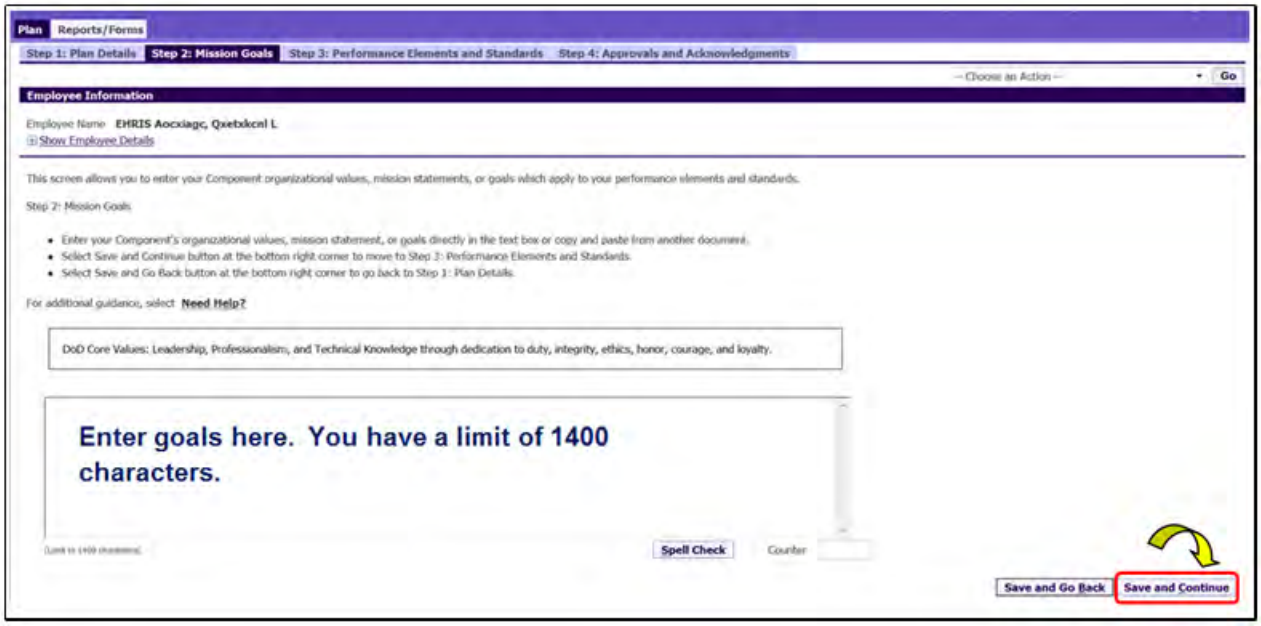


Figure 12 - *Plan > Step 2: Mission Goals* Page

6. The *Performance Elements and Standards* page is displayed as depicted below. To add a performance element, select **Add Performance Element** button.

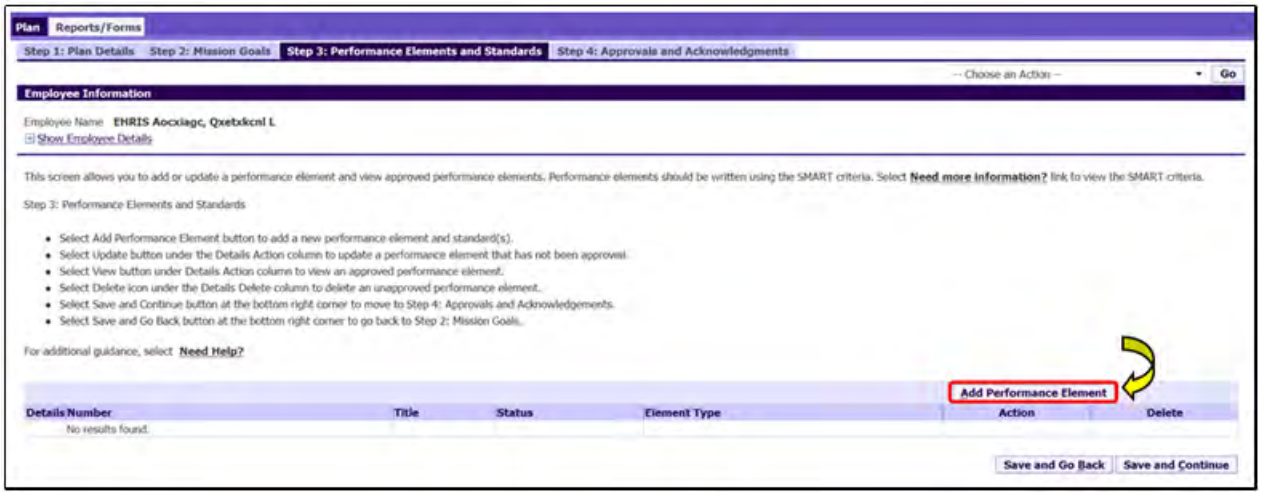


Figure 13 - *Plan > Step 3: Performance Elements and Standards* Page

7. *Add Performance Element and Standard(s)* page is displayed. The asterisk (*) on the screen indicates that the field is required.

Figure 14 - *Add Performance Element and Standards* Page

Table 3 - Performance Element and Standards Fields and Descriptions

The table below provides a description for each of the performance element and standards fields.

Field	Description
***Performance Element Title**	Give a brief description of the performance element. You may enter up to 80 characters
***Performance Element Start Date**	This field defaults to the current date Normally it should be the same as the Appraisal Period Start Date on the *Create Performance Plan* page, but it may be different if a performance element does not become active until a later date due to an anticipated change in your job responsibilities
***Performance Element Type**	Select Critical for each performance element
***Performance Element and Standard(s)**	Give a detailed description of the performance element. Performance elements and standard(s) should be Specific, Measurable, Aligned, Realistic, and Timed (SMART). The character limit for this field is 1000. An employee can have no more than 10 performance elements

Table 4 – Decision Table for Performance Elements

The table below provides direction based on the scenario indicated.

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

8. Select the **Save** button and then the **Go Back to Performance Elements** button when you have completed entering your performance elements. (See Figure 14 on page 16)

Since performance elements have been added, you can update, add, or delete a performance element.

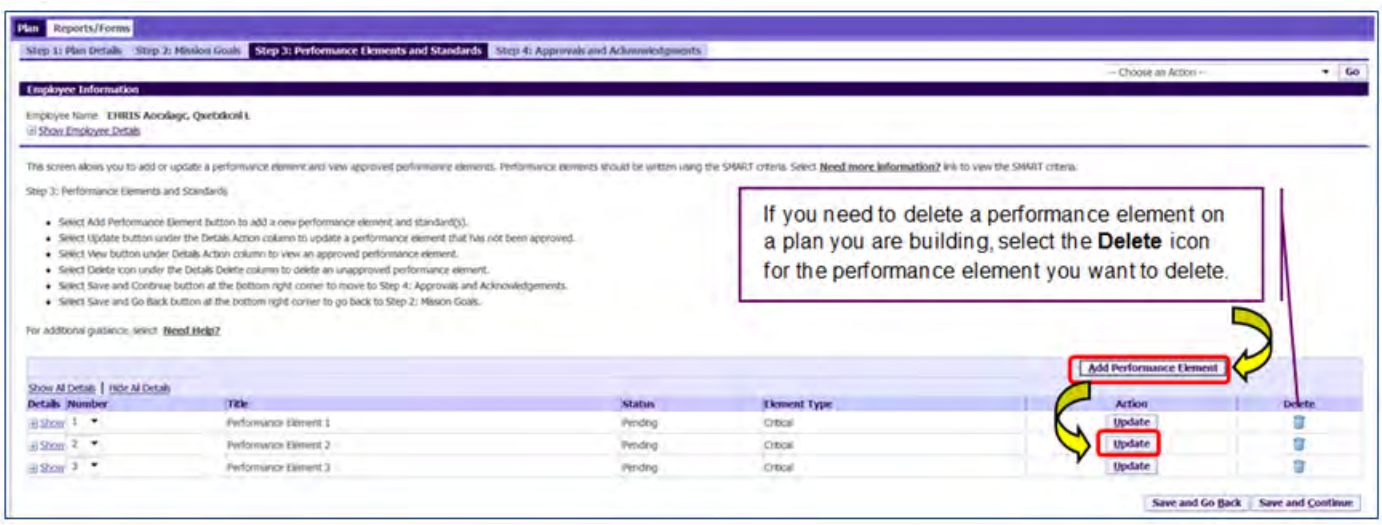


Figure 15 -*Plan > Step 3: Performance Elements and Standards* Page

9. You can review all the information you have entered on the performance plan before transferring it to your rating official for review.

To view an individual performance element, select +**Show**. To collapse the performance element, select **-Hide**. This function is available throughout the tool. (See Figures 16 and 17 below)

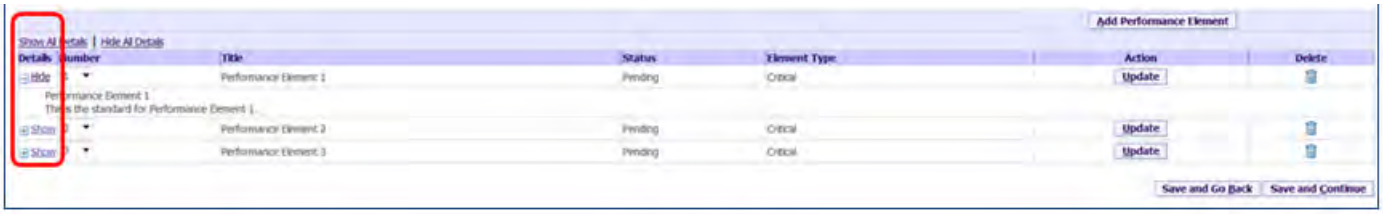


Figure 16 - *Plan > Step 3: Performance Element and Standards* Page

- To view all details of your performance element, select **Show All Details**. To collapse, select **Hide All Details** link.

Figure 17 - *Plan > Step 3: Performance Elements and Standards* Page

10. At this point you have completed your plan and are ready to transfer it to the rating official for review. There is no further action for you at this time on the *Step 4: Approvals and Acknowledgments* tab.

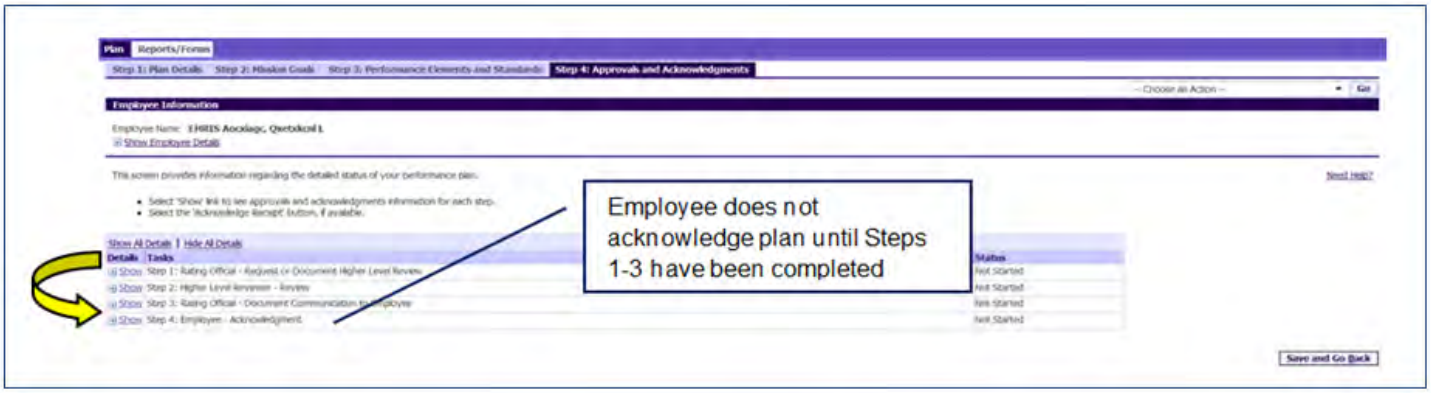


Figure 18 - *Plan > Step 4: Approvals and Acknowledgements* Page

11. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right. (See Figures 19 and 20 below)

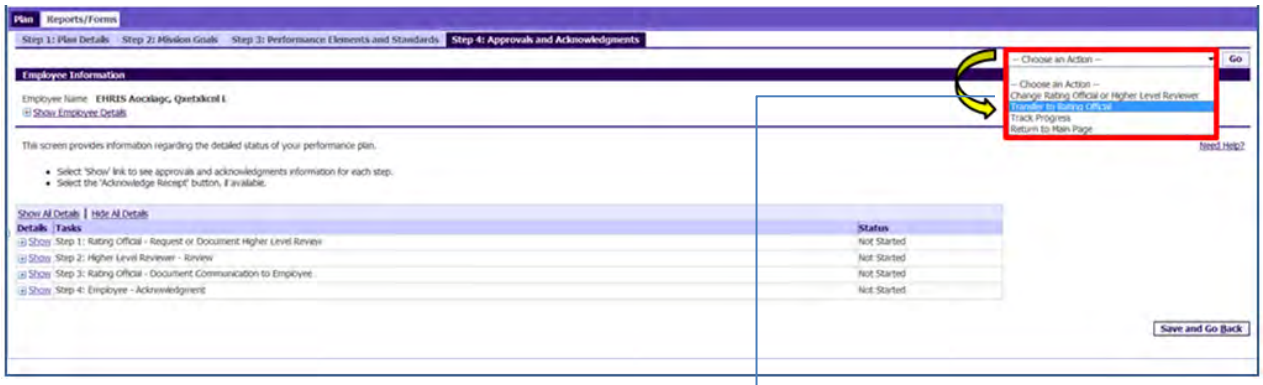


Figure 19 - *Plan > Step 4: Approvals and Acknowledgements* Page

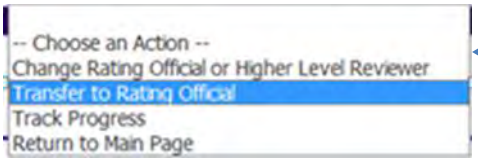


Figure 20 - *Plan > Step 4: Approvals and Acknowledgements* Page - 'Choose an Action' List of Values

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

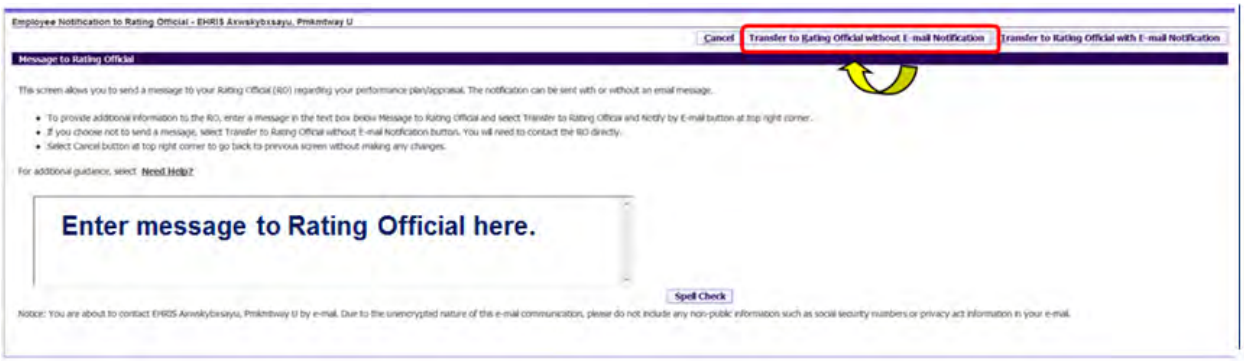


Figure 21 - *Plan> Step 4: Approvals and Acknowledgements>Employee Notification to Rating Official* Page

13. You will be returned to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. Your performance plan is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page* as pictured below in Figure 23. You no longer have ownership and can only view your performance plan.

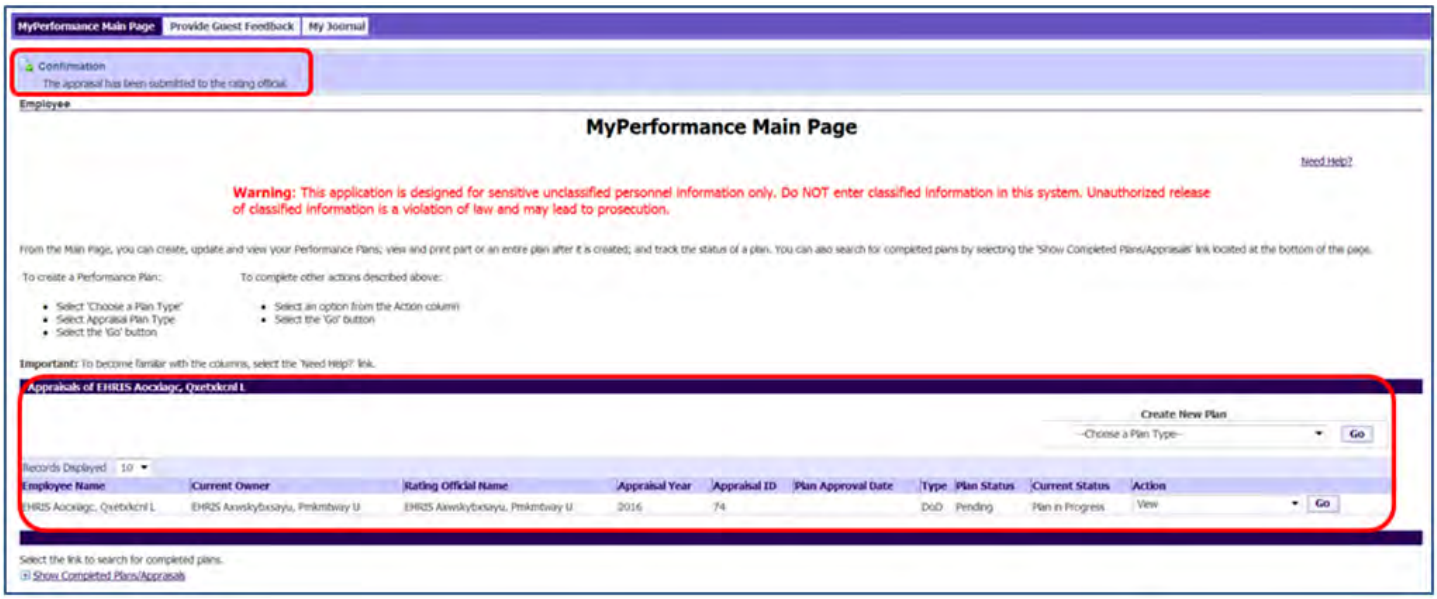


Figure 22 - *MyPerformance Main Page*

Editing the Performance 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 performance elements created by your rating official
- Creating new performance elements

After you have finished making edits and have finalized the performance elements, 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.

Follow these steps to review and edit your performance plan:

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

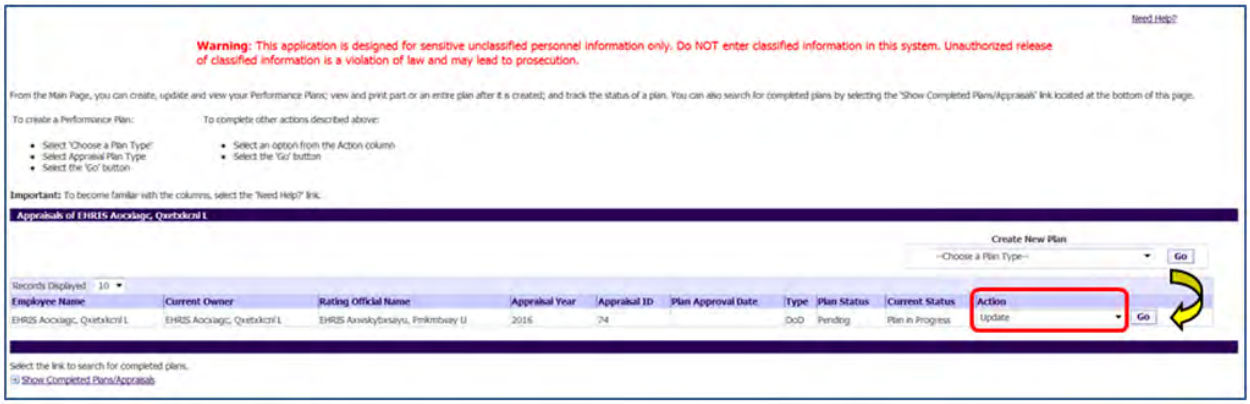


Figure 23 - *MyPerformance Main Page*

2. The *Plan Details* page is displayed as pictured below in Figure 24. Review the **Plan Details** and, if needed, make required changes. Select the **Save and Continue** button to navigate to the *Mission Goals* tab. If you need to get out of the tool at this time, you should select the **Choose an Action (**list of values (LOV)), select **Return to Main Page,** followed by the **Go** button to go back.

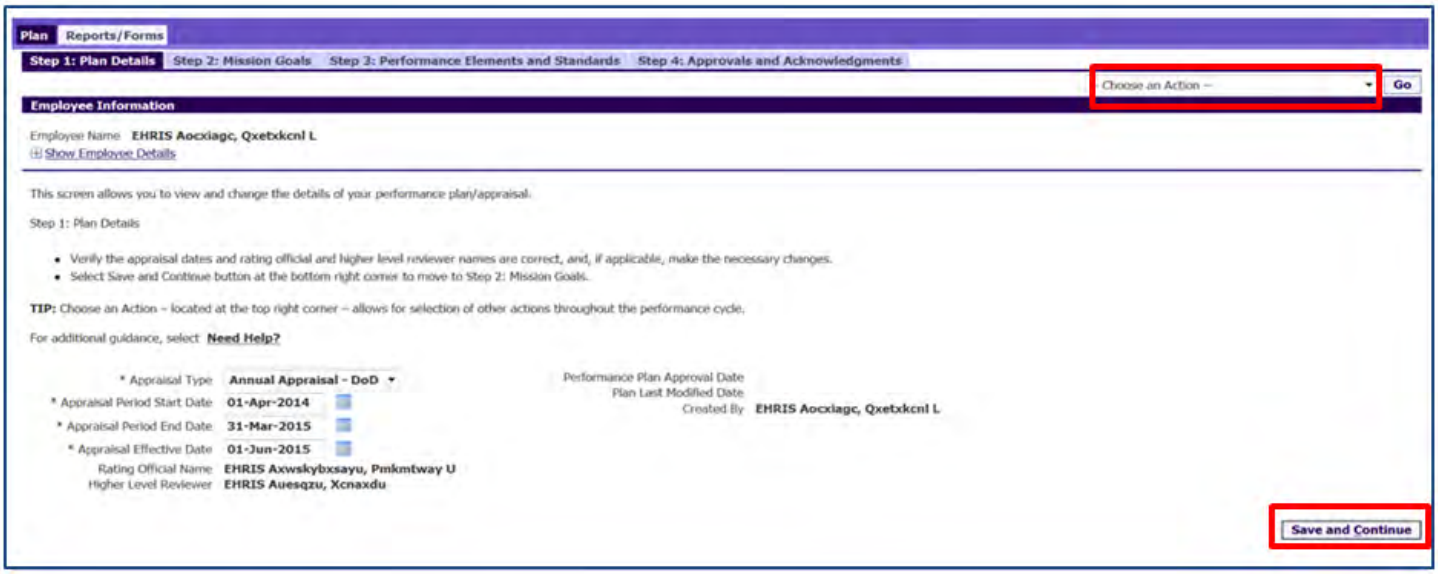


Figure 24 - *Plan > Step 1: Plan Details* Page

3. The *Mission Goals* page is displayed as pictured below in Figure 25. Review the **Mission Goals** and, if needed, make required changes. Select the **Save and Continue** button to navigate to *Performance Elements and Standards* tab. If you need to go to the *Plan Details* tab, use the **Save and Go Back** button.

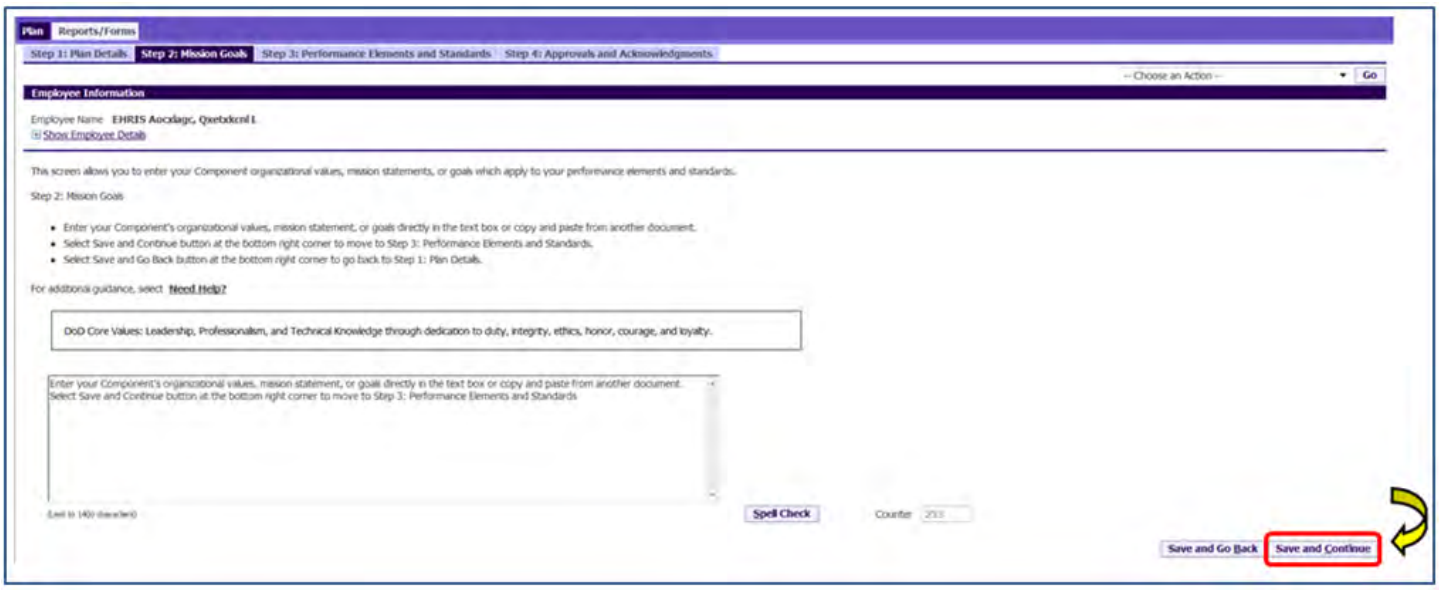


Figure 25 - *Plan > Step 2: Mission Goals* Page

4. The *Performance Elements and Standards* page is displayed. If you need to add a performance element, select the **Add Performance Element** button. You can also update your information by selecting the **Update** button.

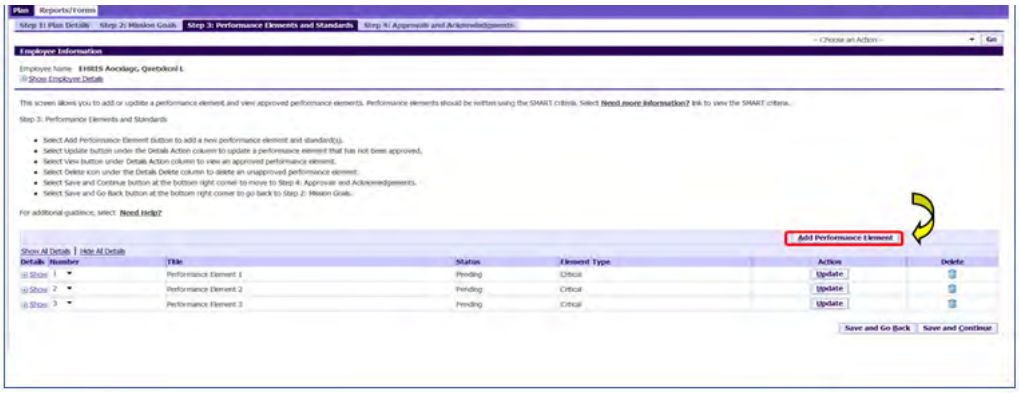


Figure 26 - *Plan > Step 3: Performance Elements and Standards* Page

5. The *Add Performance Element and Standard(s)* page is displayed. The asterisk (*) on the screen indicates that the field is required. Enter data in the required data fields and enter the performance element and standard(s). After you are finished, select the **Save** and the **Go Back to Performance Elements** buttons.

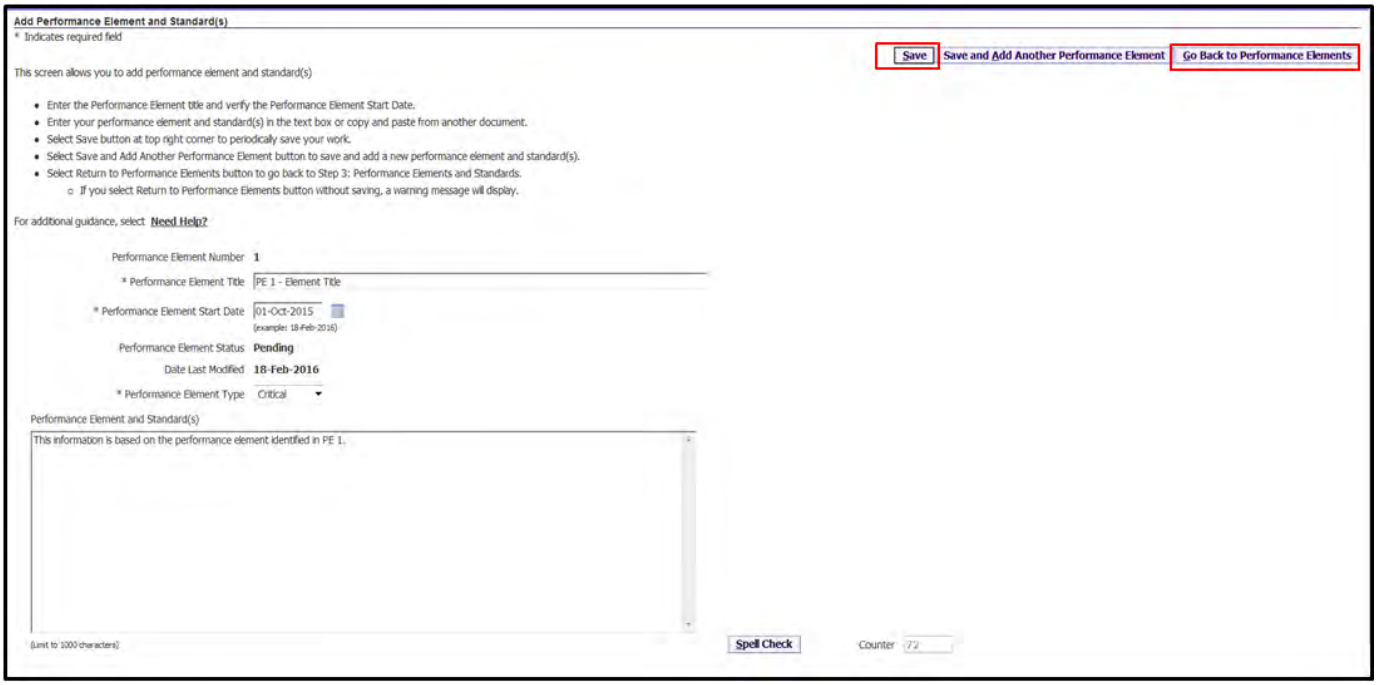


Figure 27 - *Add Performance Element and Standard(s)* Page

6. If you need to update an existing performance element, select the **Update** button under the **Action** column. **NOTE**: Once the performance plan is approved, you, the employee, cannot delete a performance standard and element.

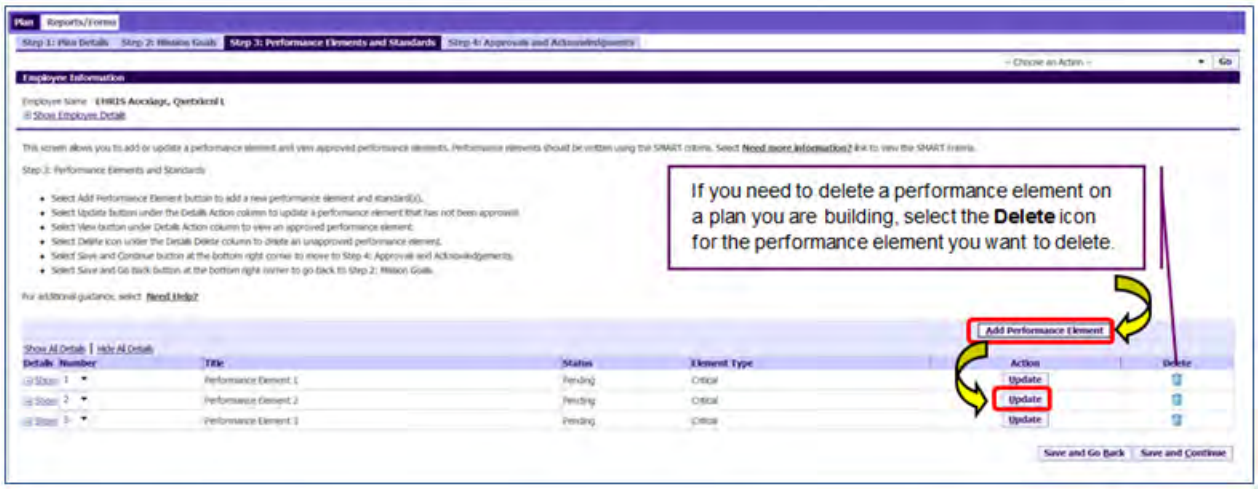


Figure 28 - *Plan > Step 3: Performance Elements and Standards* Page

7. Review performance elements, and, if needed, make required changes.

Figure 29 - *Update Performance Element and Standard(s)* Page

Table 5 – Decision Table for use when editing Performance Elements and Standards

Complete the page using one of the following options:

If You….	Then…..
Want to cancel the changes to an existing performance element	Select the **Go Back to Performance Elements** button Go Back to Performance Elements You will receive a warning message asking if you want to save the changes. Select the **No** button
Want to save the changes you made to the existing performance element and update another performance element	Select the **Save** button and then select **Go Back to Performance Elements** button Save Go Back to Performance Elements
Want to save your updates periodically on the same page	Select the **Save** button Save
Finished updating performance elements and want to return to the *Performance Elements and Standards* tab	Select the **Save** button and then select **Go Back to Performance Elements** button Save Go Back to Performance Elements

8. At this point you have made all of the changes for your plan and are ready to transfer it to the rating official for review. There is no action for you, the employee, on the *Approvals and Acknowledgments* tab.

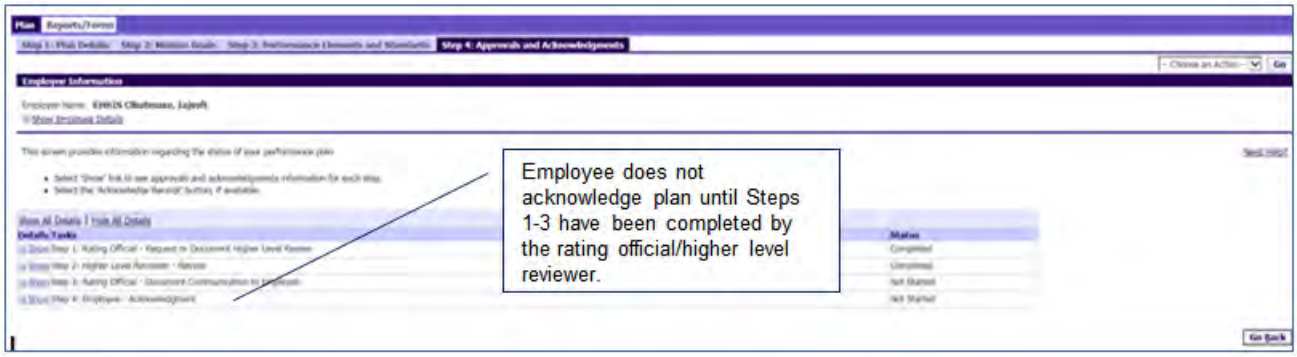


Figure 30 - *Plan > Step 4: Approvals and Acknowledgements* Page

9. To transfer your plan to the rating official, first select the **Choose an Action** list of values (LOV) depicted in the red box below. Second, select **Transfer to Rating Official**. Lastly select the **GO** button to the right.

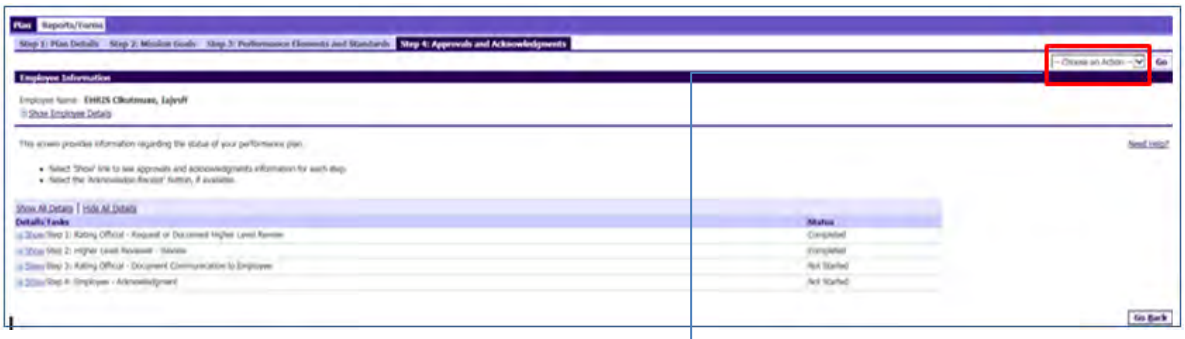


Figure 31 - *Plan > Step 4: Approvals and Acknowledgements* Page

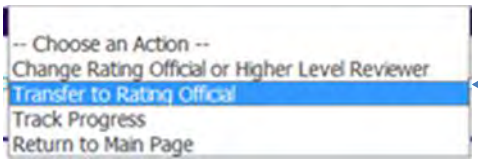


Figure 32 - *Plan > Step 4: Approvals and Acknowledgements* Page - 'Choose an Action' List of Values

10. You have the option to transfer to the rating official with or without e-mail notification. If you choose to enter comments in the **Message to Rating Official** area, your message will show up in the e-mail. Select the **Transfer to Rating Official without E-mail Notification** or **Transfer to Rating Official with E-mail Notification** button to transfer your performance plan to your rating official.

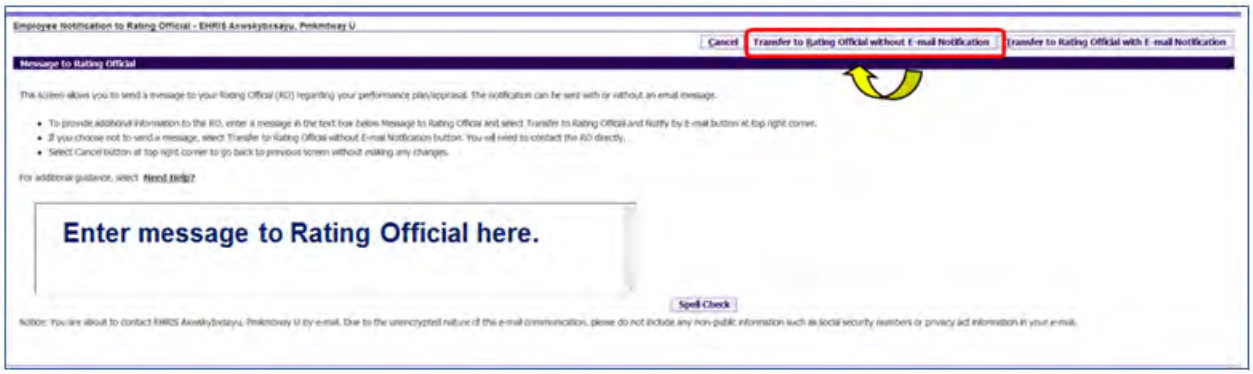


Figure 33 - *Plan > Approvals and Acknowledgements > Employee Notification to Rating Official* Page

11. You will be navigated to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the rating official. You no longer have ownership and can only view your performance plan.

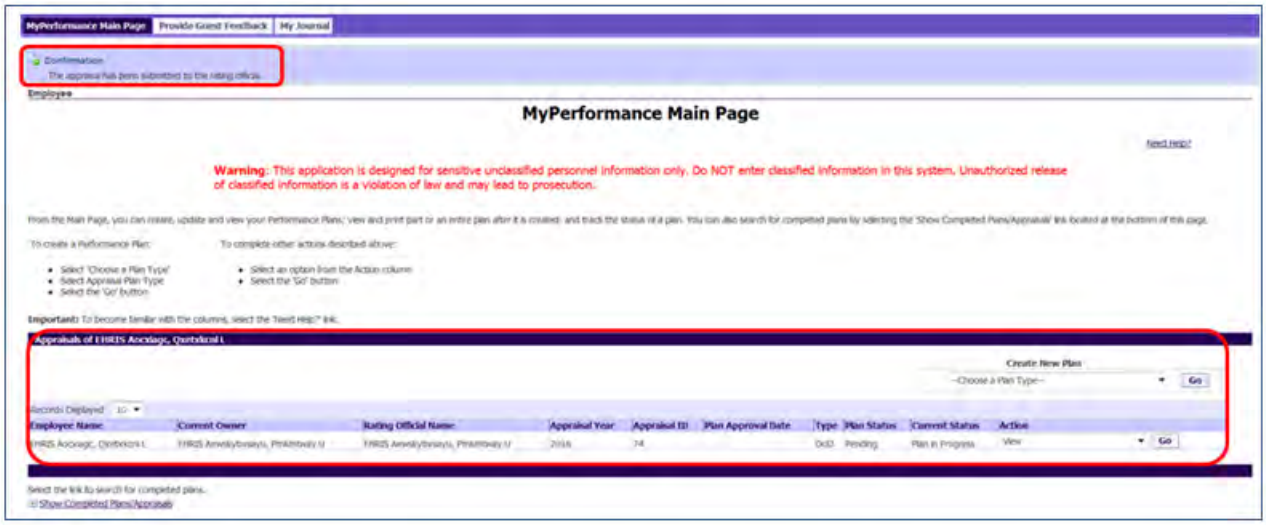


Figure 34 - *MyPerformance Main Page* with Confirmation

Acknowledging the Performance Plan (Employee)

After your rating official has finalized your performance plan and, if necessary, the performance plan has been approved by the higher level reviewer, he or she transfers the plan to you. The employee and the rating official should communicate about the final plan, then acknowledge the performance plan has been communicated to you.

Acknowledging the performance plan was communicated to you does not mean you agree with it; you are merely acknowledging it was communicated to you by your rating official. You are encouraged to engage in two-way communication with your rating official, if necessary, before you reach the acknowledgement stage to try to resolve any disagreements and determine performance elements and standards that are mutually understood by both you and your rating official.

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 performance elements and standards.

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.
    - The performance plan is approved by the higher level reviewer or the rating official documents the higher level reviewer approval.

3. The rating official documents communication to employee and transfers the plan so the employee can document acknowledgment.

4. The employee reviews the performance plan and acknowledges that it was communicated to him or her by the rating official.

Follow the below steps to acknowledge communication of your performance plan.

1. When Steps 1 and 2 of the *Plan Approvals and Acknowledgments* (see Figure 35 below) have been completed, you will receive an email message stating that your plan has been approved. (See Figure 36)

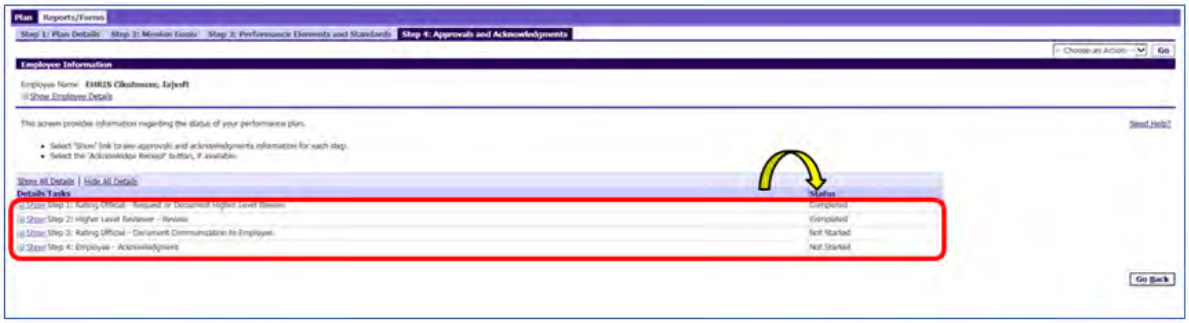


Figure 35 - *Step 4 Approvals and Acknowledgement* Tab

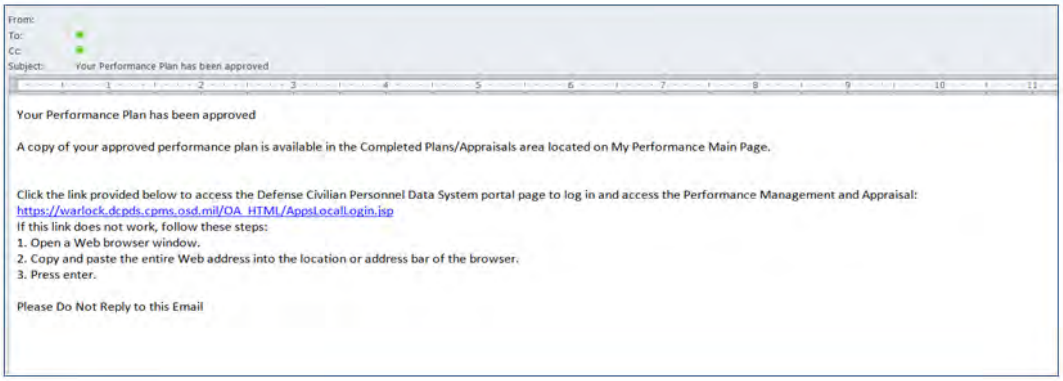


Figure 36 - Email to Employee – Plan Approved

2. When the rating official completes Step 3 on the *Approvals and Acknowledgments* tab and the rating official selects **Transfer to Employee with E-mail Notification**, the employee will receive an email message. The email will communicate where you need to proceed in the performance plan/appraisal process.

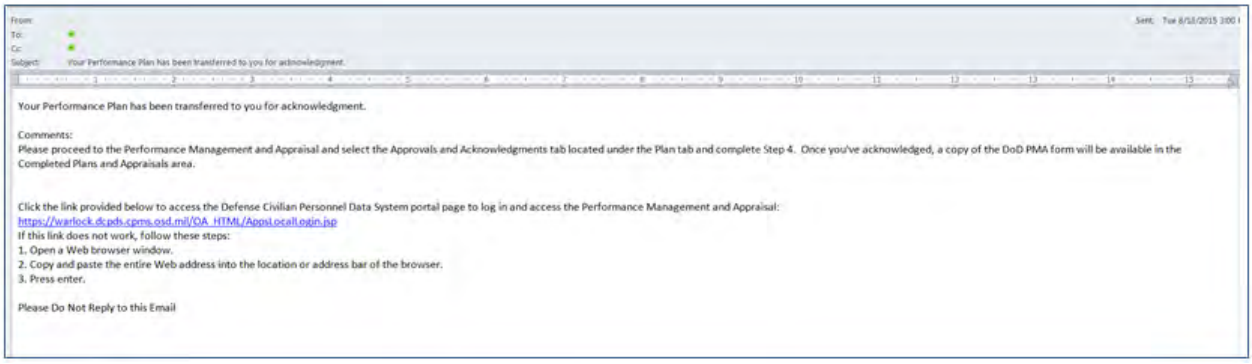


Figure 37 - Email to Employee - Next Steps

3. Select the performance plan that needs to be acknowledged from *MyPerformance Main Page*.

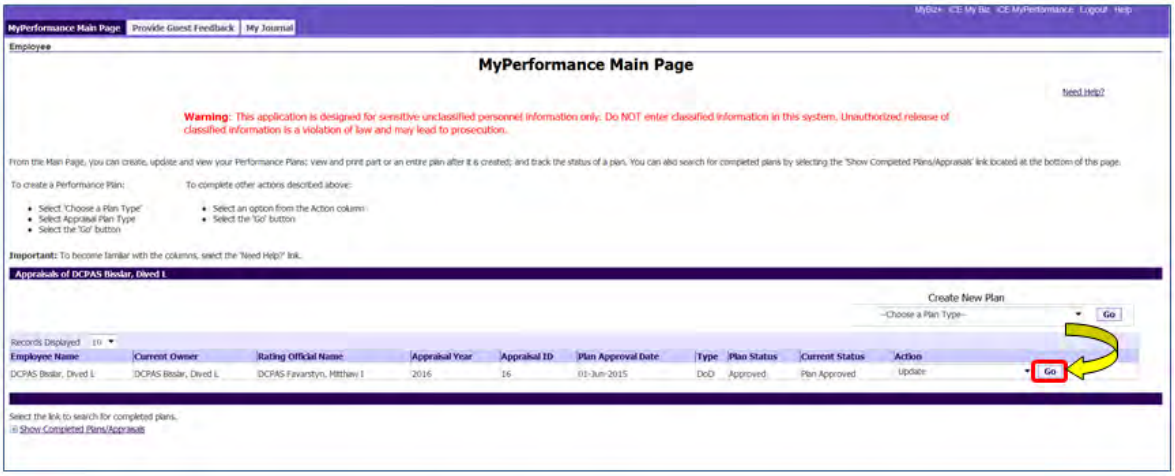


Figure 38 - *MyPerformance Main Page* - Pending Acknowledgement

4. You can review the performance plan details, mission goals and performance elements and standards before navigating to *Approvals and Acknowledgments* tab to acknowledge your plan. NOTE: Once the plan has been approved *Progress Reviews, Annual Appraisal, and Narrative Statements* tabs become available.

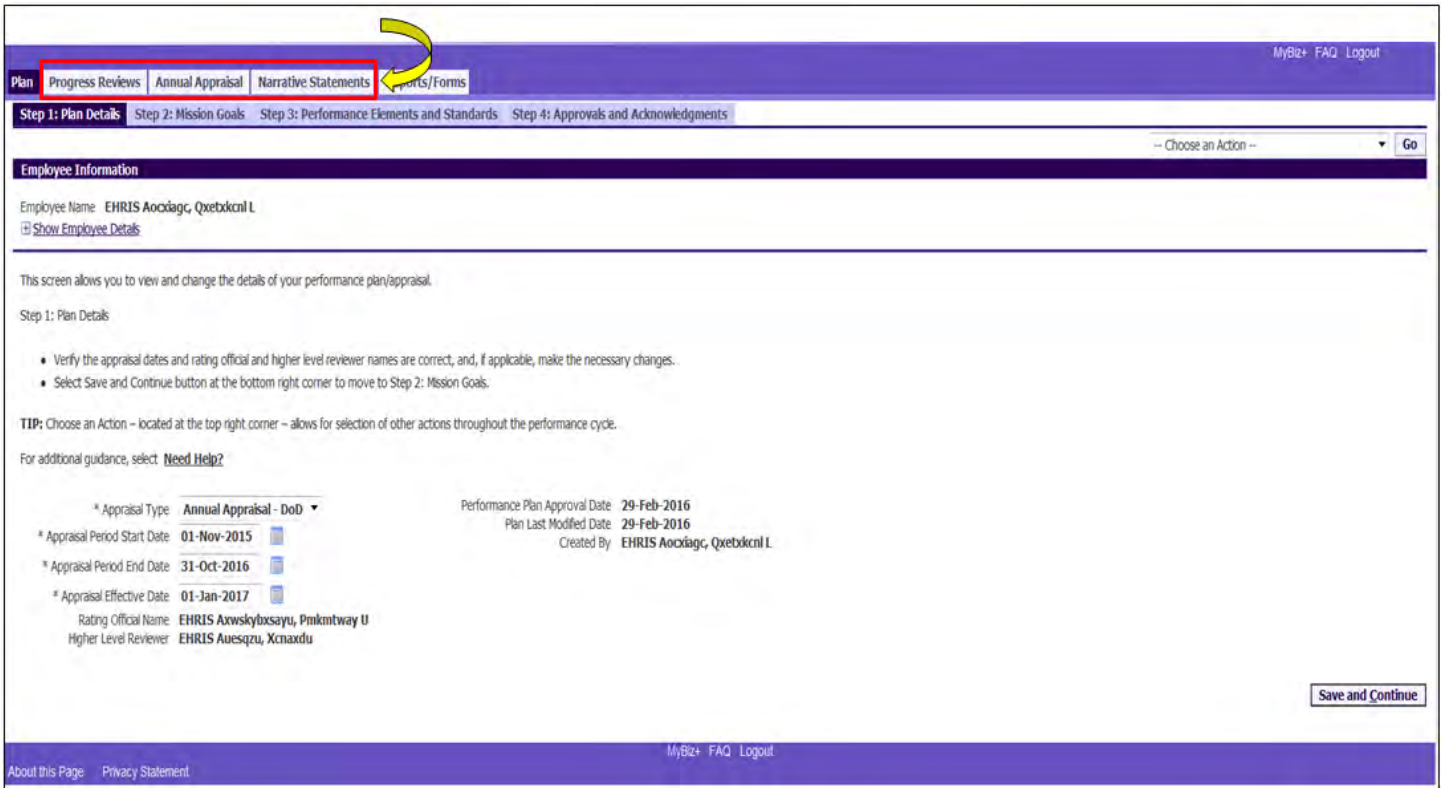


Figure 39 - *Plan* tab - Identifying Additional Tab Availability

5. Step 4 – *Details / Tasks* shows pending employee acknowledgment and the **Acknowledge Receipt** is available for selection. Select **Acknowledge Receipt** button.

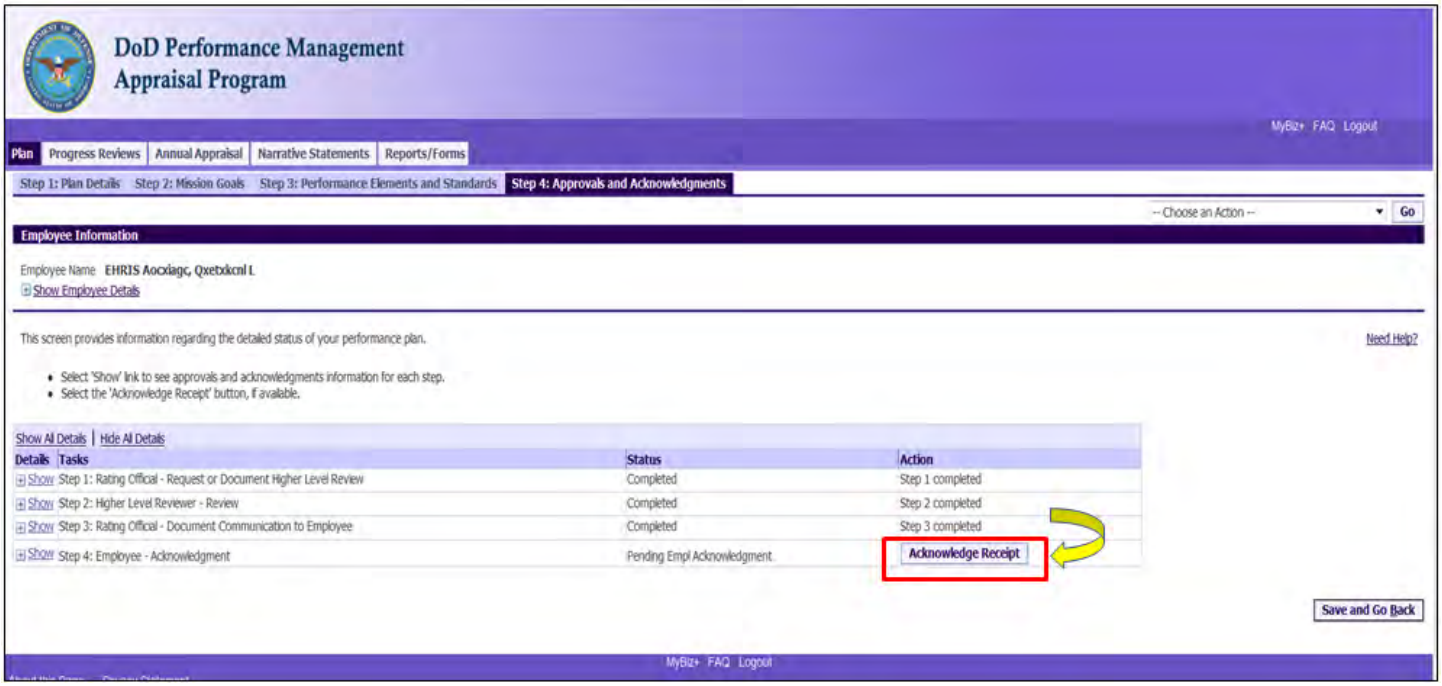


Figure 40 - *Plan>Step 4 Approvals and Acknowledgements* tab

6. When you select **Acknowledge Receipt** a Date box is available. You can manually enter the date or use the calendar icon. Enter the date you are acknowledging and select the **Save** button.

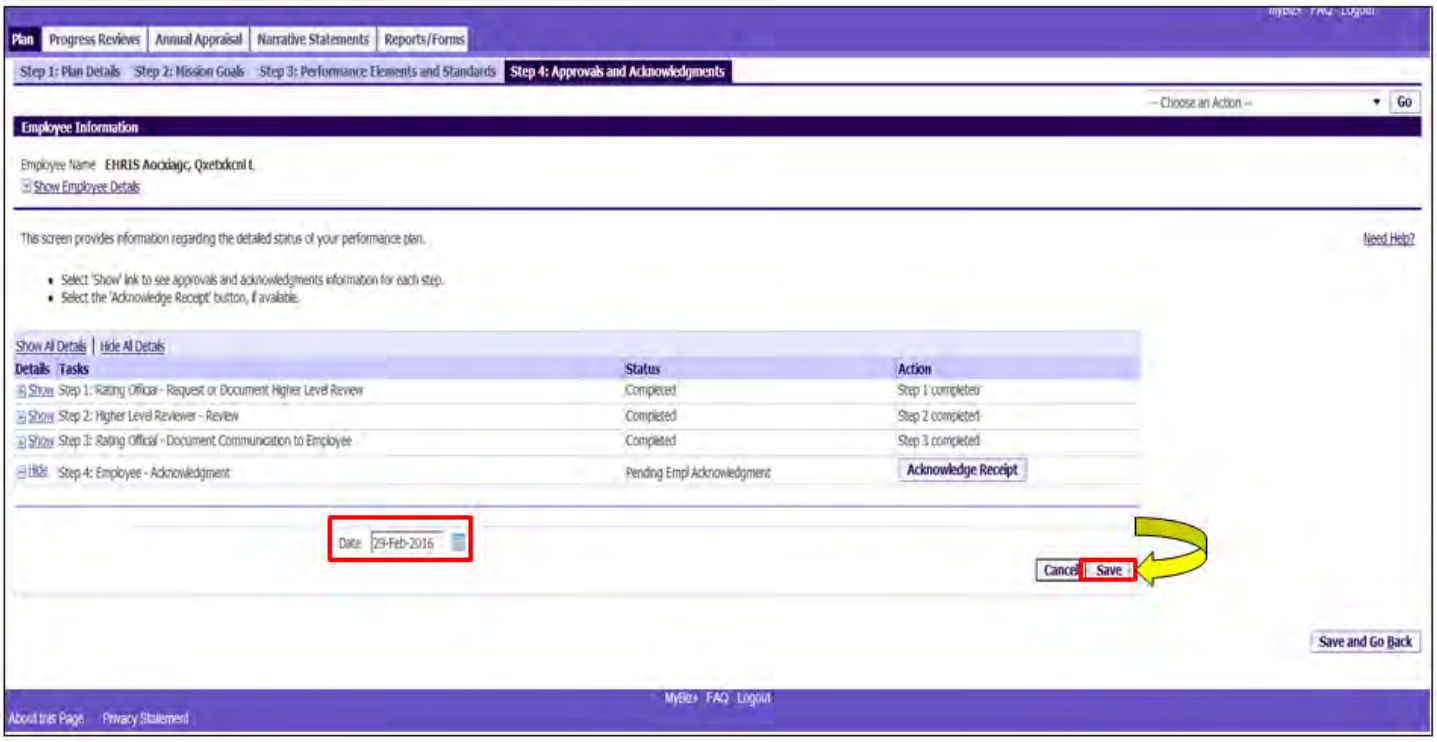


Figure 41 - *Plan>Step 4 Approvals and Acknowledgements* tab

7. Step 4 of the *Details* / *Tasks* is completed. You have just successfully acknowledged receipt of your performance plan.

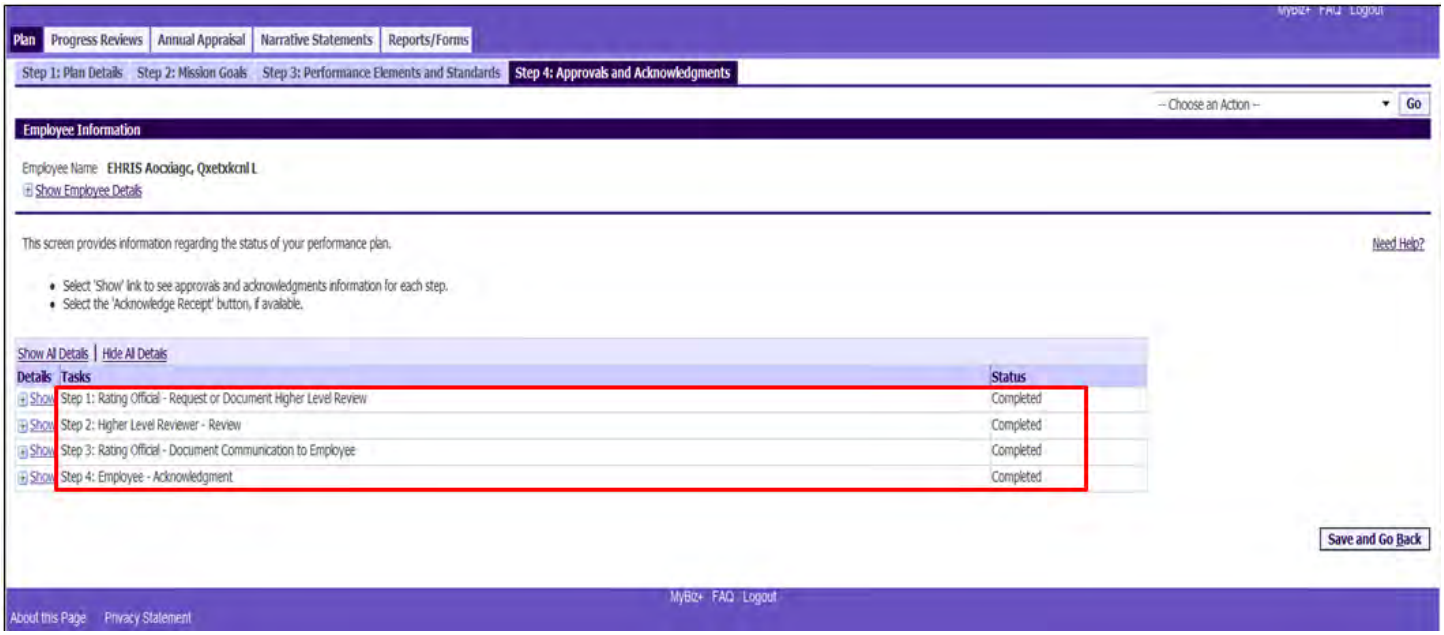


Figure 42 - *Plan>Step 4 Approvals and Acknowledgement* tab

Completed Plans/Appraisals Section

The *Completed Plans/Appraisals* section allows you to search for and see your past completed plans/appraisals.

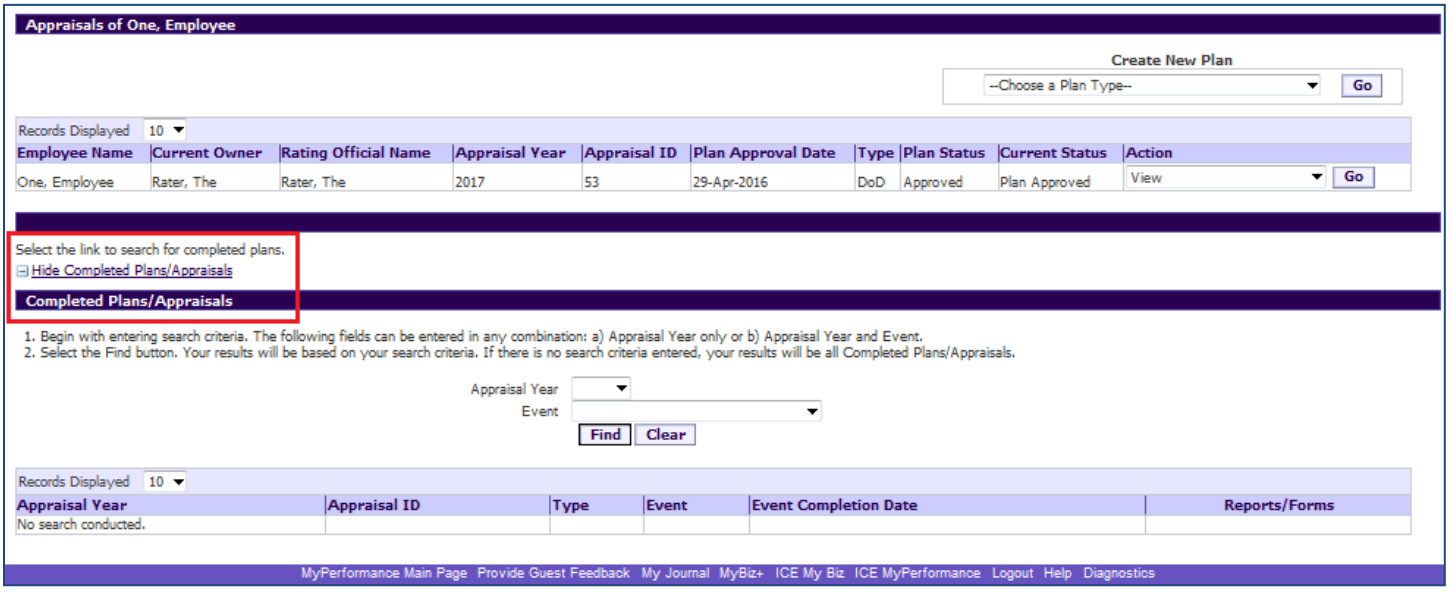


Figure 43 - *MyPerformance Main Page* - Completed Plans and Appraisals Section

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