

DoD Secure Appraisal Administrator Template NV System User Guide

DOD Performance Management and Appraisal Program (DPMAP)

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DoD Secure Appraisal Administrator Template NV_PAA Responsibility

Introduction

This responsibility is secure which means the user has limited access to records within DCPDS. The responsibility can only view or perform actions for Plans/Appraisals within his secure view and does not have 'direct' access to an employee's performance plan/appraisal. The user is allowed to change such things as the Rating Official (RO)/Higher Level Reviewer (HLR), Appraisal Start/End Date, Update same action to multiple employee plans/appraisals, View the Plan/Appraisal Status, Create a plan template, Delegate a trusted agent authorization for a RO or HLR and View/Print reports.

DCPDS Portal-Logging In

1. To access *responsibility*, you must first log in to the *DCPDS Portal* at <https://compo.dcpds.cpms.osd.mil>, agree to the DoD Notice and Consent Banner. Use your Smart Card (CAC/PIV) or non-Smart Card (non-CAC User ID) and password to log in. From there select the HR MyBiz+ Title and read the **Privacy Act Statement** and select **Accept** button. From the *MyBiz+ page select DCPDS Navigator Homepage link located under 'Other DCPDS Tools'*.

Privacy Act Statement

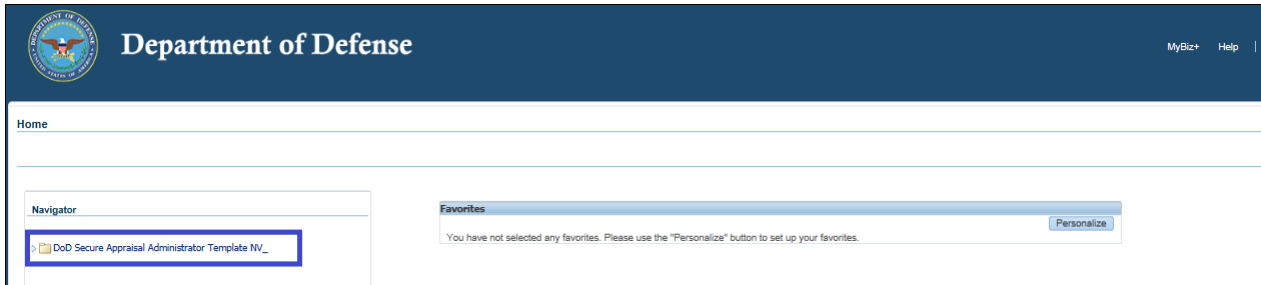
The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office.
Authorities: 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 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.

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

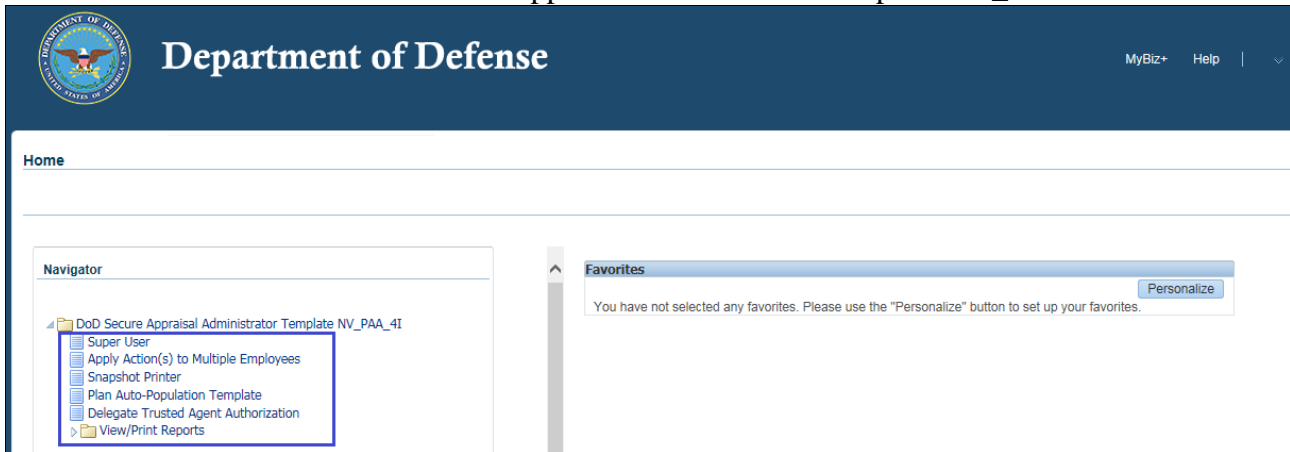
2. Other DCPDS Tools – select **DCPDS Navigator Homepage link**.

The screenshot shows the MyBiz+ portal interface. At the top, there is a navigation bar with links for 'Other DCPDS Applications', 'Favorites', 'Customer Support', 'Help', and 'Logout'. Below the navigation bar, there is a main content area. On the left, there is a 'Welcome' message and a 'Home' button. In the center, there is a 'Key Services' section with links for 'MyPerformance', 'Manager Functions', 'Performance Management and Appraisal', and 'Apply Action(s) to Multiple Employees'. On the right, there is an 'Other DCPDS Tools' section with a list of links: 'DCPDS Navigator Homepage' (highlighted with a blue box), 'Add HR Region Associations', 'DCPAS CMIS Account', 'DCPAS Data Dictionary', 'MyBiz+ for HR Professionals R125QT', and 'NG BoBJ Account'. At the top right of the main content area, there is a 'Notifications' section with a table showing 'Read / Unread', 'Title', and 'Start Date'. The table is currently empty, and a message below it says 'No Notifications At This Time'. At the bottom right of the main content area, there is a 'Manage My Views' button.

3. Select 'DoD Secure Appraisal Administrator Template NV_' link.



Functions available to the DoD Secure Appraisal Administrator template NV_PAA are:



- Super User
 - ✓ Change Rating Official
 - ✓ Change Higher Level Reviewer
 - ✓ Change Appraisal Period Start and End Dates
 - ✓ Change Status
 - ✓ Close Performance Plan
 - ✓ Delete Performance Plan
 - ✓ Transfer Plan to Rating Official
 - ✓ View Track Progress
- Apply Action(s) to Multiple Employees
- Snapshot Printer
 - ✓ View/Print Plan, Progress Review, etc.
- Plan Auto-Population Template
 - ✓ Add/Update
 - ✓ Validate
- Delegate Trusted Agent Authorization
 - ✓ Assign Trusted Agent
 - ✓ Terminate Trusted Agent Assignment
- View/Print Reports

Super User

As Super User you can make changes within the performance/appraisal such as Rating Official or Higher Level Reviewer assignment. You can change the, Appraisal Period Start Date, Appraisal Period End Date and/or Appraisal Status. The Super User can Update, Close, Delete, or Transfer performance plan/appraisal. You also have the ability to track progress of a particular plan/appraisal.

List of Plans/Appraisals Page

Following the selection of the Super User Functionality the User must identify criteria for Plans/Appraisal search. There are multiple data fields the user can use to search for records.

1. The Rating Official Name can be used on its own or in combination with other data fields such as Appraisal Year.
2. Select the magnifying glass icon if the name entered does not display.

The screenshot shows the 'DoD Performance Management Appraisal Program' search page. The 'Appraisal Search' section contains a form with fields for 'Rating Official Name', 'Employee Name', 'Current Status', and 'Appraisal Year'. A magnifying glass icon is next to the 'Rating Official Name' field. Below the form are 'Find' and 'Clear' buttons. The 'Find' button is circled in red. Below the search form is a table with columns: Rating Official, Employee Name, Appraisal Year, Appraisal Effective Date, Appraisal Period Start Date, Appraisal Period End Date, Plan Status, Current Status, Appraisal ID, Owner, and Action. The table currently shows 'No search conducted.'

3. Select Find button

4. Based on the search criteria entered, a list of the plans/appraisals matching the criteria will display on the table.

The screenshot shows the same search page as above, but with search results displayed in the table. A blue arrow points to the 'Find' button. The table has columns: Rating Official, Employee Name, Appraisal Year, Appraisal Effective Date, Appraisal Period Start Date, Appraisal Period End Date, Plan Status, Current Status, Appraisal ID, Owner, and Action. The table contains three rows of data. The 'Action' column for the first row has a dropdown menu open, showing options: Update, Close, and Track Progress. The 'Update' option is highlighted.

Rating Official	Employee Name	Appraisal Year	Appraisal Effective Date	Appraisal Period Start Date	Appraisal Period End Date	Plan Status	Current Status	Appraisal ID	Owner	Action
RO Name	Employee One	2017	01-Jun-2017	01-Apr-2016	31-Mar-2017	Initiated	Plan in Progress	277	RO Name	Update
RO Name	Employee Two	2017	01-Jun-2017	01-Apr-2016	31-Mar-2017	Reapproved	Progress Review Completed	205	RO Name	Update
RO Name	Employee Three	2017	01-Jun-2017	01-Apr-2016	31-Mar-2017	Approved	Progress Review Pending HLR Approval	210	RO Name	Update

5. To view the available list of actions for a record, select the drop down arrow under the 'Action' column. If updates are to be made, make sure the 'Update' is available under the 'Action' column, then the Go button.

Update Appraisal Page

The Plan/Appraisal data identified in the boxes can be changed. The data fields that have an ‘*’ are required data fields and can’t be left blank.

Change Rating Official

1. To change the Rating Official, select the **Magnifying Glass** icon to search for a new Rating Official name.

Note: All information under the Appraisal Details is the current information for the plan/appraisal selected.

DoD Performance Management Appraisal Program

Update Appraisal

Appraisal Details

- * Rating Official: Rating Official Name
- * Higher Level Reviewer: Higher Level Reviewer Name
- Employee Name: Employee One
- Appraisal ID: 205
- Appraisal Type: Annual Appraisal - DoD
- Appraisal Effective Date: 01-Jun-2017
- Appraisal Period Start Date: 01-Apr-2016
- Appraisal Period End Date: 31-Mar-2017
- * Appraisal Status: Progress Review Completed
- * Plan Status: Reapproved

2. On the Search and Select: Rating Official page, enter the new Rating Official Name and select Go button.

Search and Select: Rating Official

Search

Select a field to 'Search By'. Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the '%'; e.g., Smi% or O2%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and first name followed by the %, e.g. Smith%John%. Select the "Go" button. Select the 'Quick Select' icon next to your selection.

Search By: Rating Official's Name | **New Rating Official Name** | **Go**

3. Select 'radio button' or 'Quick Select' link for the Rating Official.

Search and Select: Rating Official

Search

Select a field to 'Search By'. Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the '%'; e.g., Smi% or O2%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and first name followed by the %, e.g. Smith%John%. Select the "Go" button. Select the 'Quick Select' icon next to your selection.

Search By: Rating Official's Name | **New Rating Official Name** | **Go**

Select	Quick Select	Rating Official's Name	Rating Official's Employee Number	Rating Official's Person ID	Organization	Person Type	Pay Plan-Series-Grade/Step
<input type="radio"/>		New Rating Official Name	333333	33334444	Org A	Employee	XX-XXXX-XX

4. Select Apply button to save the changes that were made.

DoD Performance Management Appraisal Program

Update Appraisal

Appraisal Details

* Rating Official: New Rating Official Name

* Higher Level Reviewer: Higher Level Reviewer Name

Employee Name: Employee One

Appraisal ID: 203

Appraisal Type: Annual Appraisal - DoD

Appraisal Effective Date: 01-Jan-2018

Appraisal Period Start Date: 01-Jul-2016

Appraisal Period End Date: 31-Dec-2017

* Appraisal Status: Progress Review Completed

* Plan Status: Approved

Cancel Apply

Cancel Apply

Changing Higher Level Reviewer

1. To change the Higher Level Reviewer, select the **Magnifying Glass** icon to search for the new Higher Level Reviewer name needed for the change. **Note:** All information under the Appraisal Details is the current information for the plan/appraisal selected.

DoD Performance Management Appraisal Program

Update Appraisal

Appraisal Details

* Rating Official: Rating Official Name

* Higher Level Reviewer: Higher Level Reviewer Name

Employee Name: Employee One

Appraisal ID: 205

Appraisal Type: Annual Appraisal - DoD

Appraisal Effective Date: 01-Jun-2017

Appraisal Period Start Date: 01-Apr-2016

Appraisal Period End Date: 31-Mar-2017

* Appraisal Status: Progress Review Completed

* Plan Status: Reapproved

Cancel Apply

Cancel Apply

2. Enter new Higher Level Reviewer Name for change and select **Go** button.

Search and Select: Rating Official

Search

Select a field to "Search By". Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the '%'; e.g., Smi% or D2%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and first name followed by the %, e.g. Smith%John%. Select the "Go" button. Select the "Quick Select" icon next to your selection.

Search By: Rating Official's Name

New Higher Level Reviewer Name

Go

Results

Cancel Select


3. Select 'radio button' or 'Quick Select' link for the Higher Level Reviewer.

The screenshot shows a web browser window with the URL https://warlock.dcpds.cpmc.osd.mil/?_t=fredRC&enc=WINDOWS-1252&_minWidth=750&_minHeight=550&con. The page title is "Search and Select: Rating Official".

At the top right, there are "Cancel" and "Select" buttons. Below the title is a "Search" section with instructions: "Select a field to 'Search By'. Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the '%'; e.g., Smi% or O2%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and first name followed by the %, e.g. Smith%John%. Select the 'Go' button. Select the 'Quick Select' icon next to your selection."

The search criteria are: "Search By" set to "Rating Official's Name", "New Higher Level Reviewer Name" entered in the text field, and a "Go" button. A "Quick Select" icon (a magnifying glass over a document) is highlighted with a blue circle.

Below the search criteria is a "Results" table:

Select	Quick Select	Rating Official's Name	Rating Official's Employee Number	Rating Official's Person ID	Organization	Person Type	Pay Plan-Series-Grade/Step
<input type="radio"/>		New Higher Level Reviewer Name	45454545	76765	Org B	Employee	XX-XXXX-XX

At the bottom right, there are "Cancel" and "Select" buttons.

4. Select Apply button to save the changes that were made.

The screenshot shows the "DoD Performance Management Appraisal Program" interface. The page title is "Update Appraisal". At the top right, there are "MyBiz+", a dropdown arrow, and "Logged In As".

Below the title is an "Appraisal Details" section with the following fields:

- * Rating Official: (with a search icon)
- * Higher Level Reviewer Employee Name: (with a search icon)
- Appraisal ID: 203
- Appraisal Type: Annual Appraisal - DoD
- Appraisal Effective Date: 01-Jan-2018
- Appraisal Period Start Date: 01-Jul-2016 (with a calendar icon)
- Appraisal Period End Date: 31-Dec-2017 (with a calendar icon)
- * Appraisal Status: (with a dropdown arrow)
- * Plan Status: Approved

At the bottom right, there are "Cancel" and "Apply" buttons. A blue arrow points upwards towards the "Apply" button.

Changing Appraisal Period Start/End Date

1. Select the Calendar icon and pick date for change. To save changes, select the **Apply** button. The Cancel button is available to select if you decide to not make changes.

Changing Appraisal Status

Not all appraisal statuses can be changed. Below is a table depicting what the status can be changed to depending on the current appraisal status.

If Current Appraisal Status Equals	Then Status can be changed to
Plan Pending HLR Review	Plan Returned for Change
Plan Returned for Change	Plan Pending HLR Review
Progress Review Pending HLR Approval	Progress Review Returned for Change
Progress Review Returned for Change	Progress Review Pending HLR Approval
Appraisal Pending HLR Approval	Appraisal Returned for Change
Appraisal Returned for Change	Appraisal Pending HLR Approval
Closed	Plan Approved
Deleted	Plan in Progress
Appraisal Approved by HLR	Appraisal Pending HLR Approval

Close Performance Plan

Closing a performance plan can only be accomplished on an 'Approved' plan. For example, if an employee departs their position before he/she is eligible for a rating and the plan is Approved, the plan can be closed.

1. There are two options for closing an Approved performance plan.

Option 1: Select the drop down arrow and select Close from list. Save changes by selecting the **Apply** button.

Note: A new plan can then be created for the new position under the new Rating Official.

Appraisal Details

* Rating Official: Rating Official Name
 * Higher Level Reviewer: Higher Level Reviewer Name
 Employee Name: Employee Name
 Appraisal ID: 453
 Appraisal Type: Annual Appraisal - DoD
 Appraisal Effective Date: 01-Jun-2018
 Appraisal Period Start Date: 01-Apr-2017
 Appraisal Period End Date: 31-Mar-2018
 * Appraisal Status: Plan Reviewed by HLR
 * Plan Status: Approved

Buttons: Cancel, Apply

Option 2: Return to the 'Appraisal Search' and select arrow down under Action column and select Close then select the **Go** button.

List of Plans/Appraisals

Search for appraisals in order to View, Delete, Close, Update or Track Progress.

Appraisal Search

Please enter a rating official or employee name, then select the Find button.

Rating Official: Rating Official Name
 Employee Name: Employee Name
 Current Status: [Dropdown]
 Appraisal Year: [Dropdown]
 Example: 2013

Buttons: Find, Clear

Rating Official	Employee Name	Appraisal Year	Appraisal Effective Date	Appraisal Period Start Date	Appraisal Period End Date	Plan Status	Current Status	Appraisal ID	Owner	Action
RO Name	Employee Two	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Reapproved	Plan Approved	205	RO Name	Update
RO Name	Employee One	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Approved	Plan Approved	277	RO Name	Close Track Progress Update

Buttons: Go

2. Always read warnings carefully. Select **Yes** button to continue with closing the plan. If you do not want to close the plan at this point, select the No button. Updates cannot be made to a closed plan.

DoD Performance Management Appraisal Program

MyBiz+ | Home | Logout

Warning

By closing the PAA record for **Employee Two** it will no longer be available for update. All previous DoD PMA Form information captured for this employee will continue to be available on the Performance Appraisal Main Page under the Completed Plans/Appraisals area. Do you wish to close this record? Yes or No.

Buttons: No, Yes

Delete Performance Plan

The delete action is only available if a plan is not approved. For example, if a Rating Official started a plan on one of his/her employee and the employee leaves position for another, that plan can be deleted. Another example would be if there are duplicate plans on an employee and plans have different appraisal start, end or effective dates, then the plan with incorrect dates can be deleted.

1. To delete a plan, select the **Delete** choice the drop down menu under the 'Action' column and Delete the incorrect Plan.
2. Select the Go button. Note: If the 'Delete' action is available in list, then the Plan is in progress and has not been approved.

The screenshot shows the 'DoD Performance Management Appraisal Program' interface. It includes a search section and a table of appraisal plans. The table has columns for Rating Official, Employee Name, Appraisal Year, Appraisal Effective Date, Appraisal Period Start Date, Appraisal Period End Date, Plan Status, Current Status, Appraisal ID, Owner, and Action. The third row shows a plan for 'Employee Five' with a 'Plan in Progress' status. The 'Action' column for this row has a dropdown menu with 'Delete' selected. A 'Go' button is next to the dropdown.

Rating Official	Employee Name	Appraisal Year	Appraisal Effective Date	Appraisal Period Start Date	Appraisal Period End Date	Plan Status	Current Status	Appraisal ID	Owner	Action
RO Name	Employee Four	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Reapproved	Plan Approved	312	RO Name	Update
RO Name	Employee Five	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Initiated	Plan in Progress	318	RO Name	Delete
										Transfer to Rating Official
										Track Progress

Transfer to Rating Official

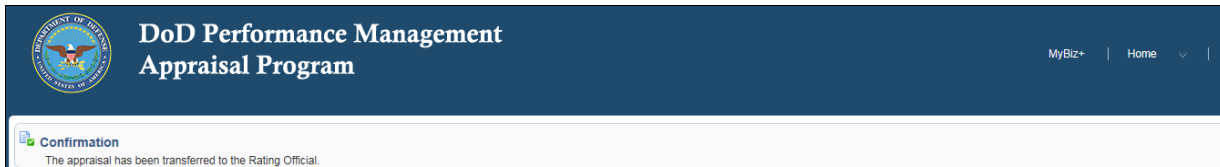
1. The 'Transfer to Rating Official' action is available. If the plan requires transfer from the Employee or HLR to the RO because the employee or HLR has left the job, and the employee currently owns the plan, select the **Transfer to Rating Official** from the drop down menu under the Action column.

2. Select the Go button.

The screenshot shows the 'DoD Performance Management Appraisal Program' interface. It includes a search section and a table of appraisal plans. The table has columns for Rating Official, Employee Name, Appraisal Year, Appraisal Effective Date, Appraisal Period Start Date, Appraisal Period End Date, Plan Status, Current Status, Appraisal ID, Owner, and Action. The third row shows a plan for 'Employee Five' with a 'Plan in Progress' status. The 'Action' column for this row has a dropdown menu with 'Transfer to Rating Official' selected. A 'Go' button is next to the dropdown.

Rating Official	Employee Name	Appraisal Year	Appraisal Effective Date	Appraisal Period Start Date	Appraisal Period End Date	Plan Status	Current Status	Appraisal ID	Owner	Action
RO Name	Employee Four	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Reapproved	Plan Approved	312	RO Name	Track Progress
RO Name	Employee Seven	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Approved	Plan Approved	320	RO Name	Update
RO Name	Employee Five	2018	01-Jun-2018	01-Apr-2017	31-Mar-2018	Initiated	Plan in Progress	318	RO Name	Transfer to Rating Official

3. A confirmation message is received that the plan has been transferred to Rating Official.



Track Progress

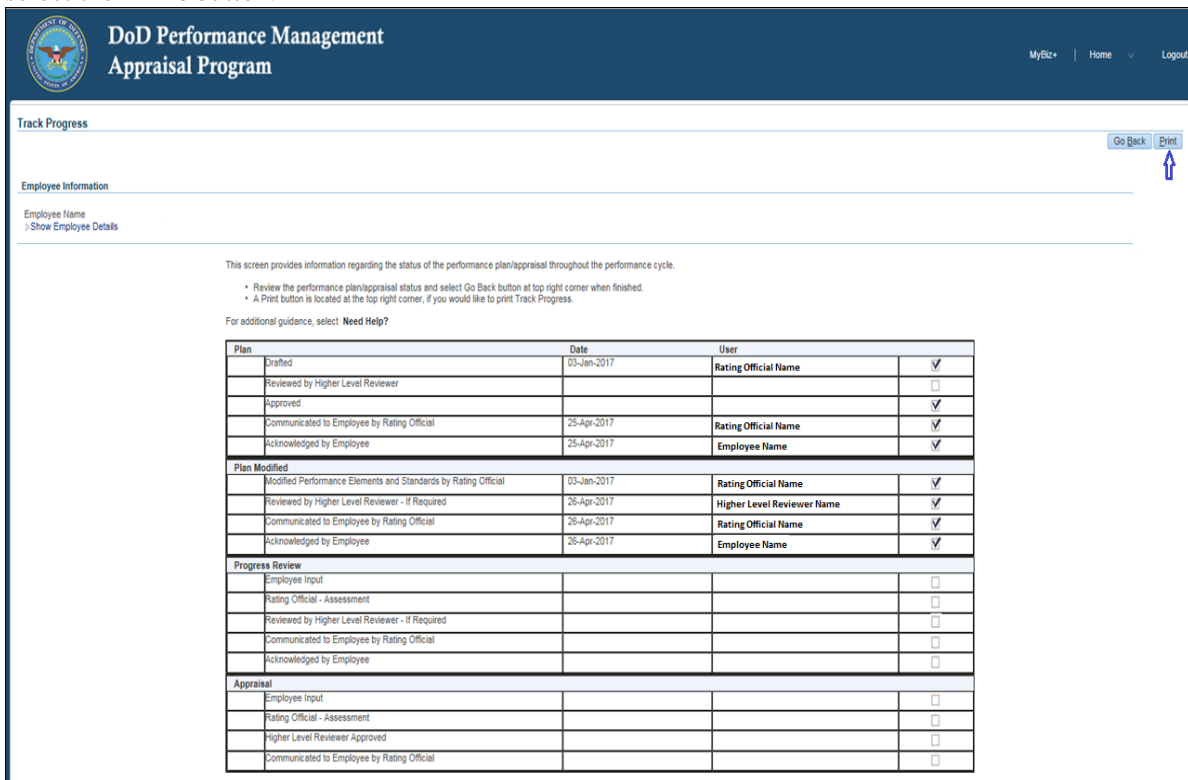
Track progress provides a view of the plan/appraisal status throughout the performance cycle.

1. Select the **Track Progress** from under the Action column.

2. Select the Go button.



3. This screen tracks the progress of the Performance Plan/Progress Review/Appraisal. To print track progress, select the **Print** button.



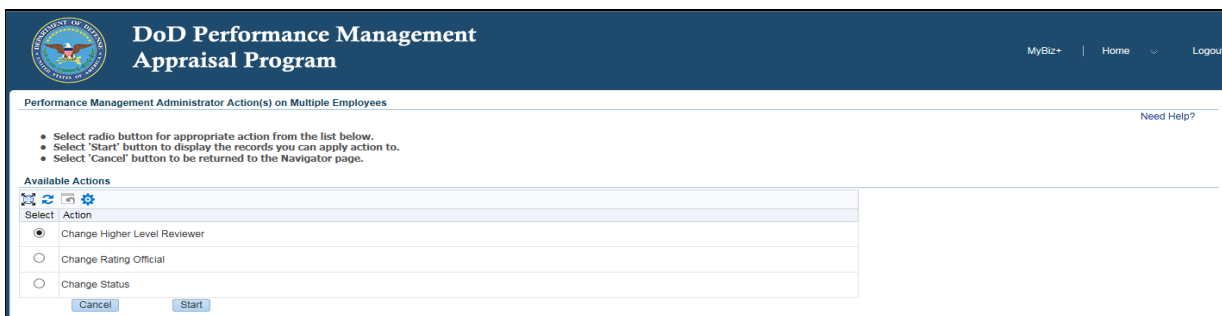
Apply Action(s) to Multiple Employees

This functionality allows action to be taken on one or multiple plan/appraisals.

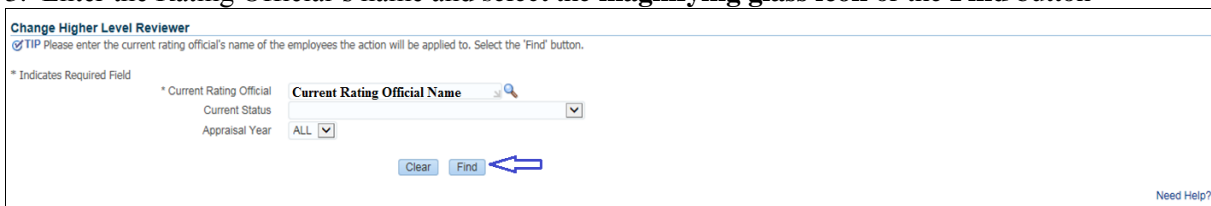
1. Select **Apply Action(s) to Multiple Employees** link under the Navigator.



2. There are three actions available from the list. Select **Change Higher Level Reviewer** option and then select the **Start** button.



3. Enter the Rating Official's name and select the **magnifying glass icon** or the **Find** button



4. When a list of employees comes up, select the box(s) for the record(s) requiring change and then select the **Next** button. Note: Use the **Select All** link if all records require changes.

Change Higher Level Reviewer
 * TIP Please enter the current rating official's name of the employees the action will be applied to. Select the 'Find' button.

* Indicates Required Field

* Current Rating Official:

Current Status:

Appraisal Year:

Need Help?

Search Results
 Select the records to which the action should be applied and select Next.

Select All | Select None

Select	Employee Name	Current Owner	Appraisal Year	Appraisal Id	Plan Approval Date	Plan Status	Current Status
<input type="checkbox"/>	Employee One	Rating Official	2017	277		Pending	Plan in Progress
<input type="checkbox"/>	Employee Two	Rating Official	2017	205	06-Jun-2016	Approved	Progress Review Completed
<input type="checkbox"/>	Employee Three	Rating Official	2017	210	28-Sep-2016	Approved	Progress Review Pending HLR Approval
<input type="checkbox"/>	Employee Four	Rating Official	2017	139	23-May-2016	Approved	Plan Approved
<input type="checkbox"/>	Employee Five	Rating Official	2016	140	01-Sep-2016	Approved	Progress Review Completed
<input type="checkbox"/>	Employee Six	Rating Official	2016	25		Pending	Plan in Progress
<input type="checkbox"/>	Employee Seven	Rating Official	2016	83	17-Feb-2016	Approved	Completed

5. Enter the new HLR's name in the box next to the words 'Higher Level Reviewer'. You may enter a note for the employee about the change of HLR by typing the note in the text box below the 'Notification Comments' section. Select the **Save** button to continue. The Need Help? Link is also available for steps in accomplishing the change.

Change Higher Level Reviewer

* Indicates Required Field

* Higher Level Reviewer:

Information

To confirm the new higher level reviewer, select the 'Save' button. Once you select Save, the previous higher level reviewer can no longer make changes to the appraisal.

Need Help?

This screen provides space for you to send your employees a message regarding the change in higher level reviewer.

Notification Comments

Notice: You are about to contact the selected individuals by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or Privacy Act information in your e-mail.

Selected Employees

Employee Name	Current Owner	Appraisal Year	Appraisal Id	Plan Approval Date	Plan Status	Current Status
Employee One	Rating Official	2017	277		Pending	Plan in Progress
Employee Two	Rating Official	2017	205	06-Jun-2016	Approved	Progress Review Completed
Employee Three	Rating Official	2017	210	28-Sep-2016	Approved	Progress Review Pending HLR Approval

6. Status Log

Status Log

Process Log ID	Log Status	Log Text
158763	SUCCESS	Employee Name: Employee One ; Appraisal Year: 2017; Appraisal ID: 277
158764	SUCCESS	Employee Name: Employee Two ; Appraisal Year: 2017; Appraisal ID: 205
158765	SUCCESS	Employee Name: Employee Three ; Appraisal Year: 2017; Appraisal ID: 210

The Status log confirms the success of the change. Select the **Return to Available Actions** button to return to the list of choices you can perform on multiple employees.

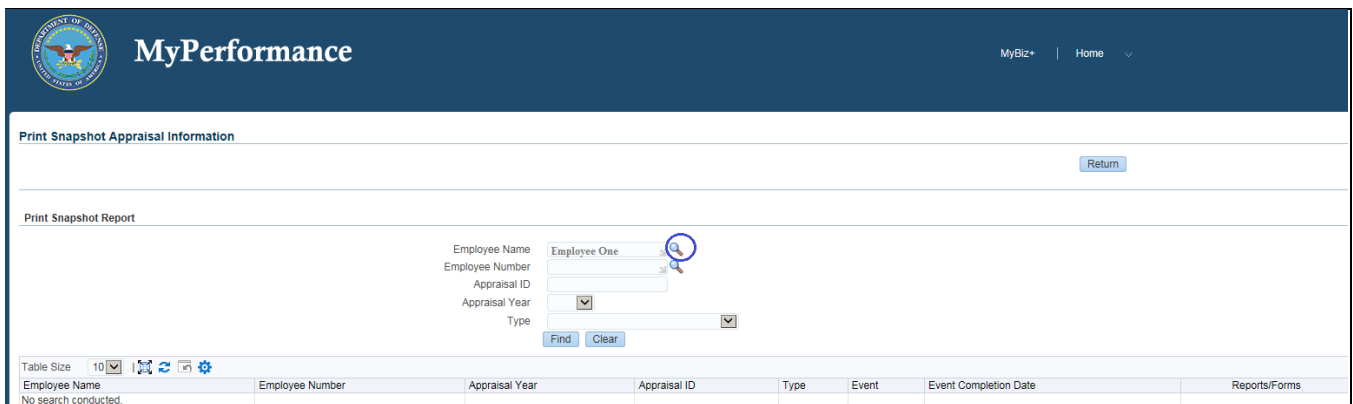
Snapshot Printer

The Snotshot Printer function allows you to view and/or print the contents of an employee's **Approved** Performance Plan, Progress Review, Narrative Statement and Annual Appraisal. In order to bring up an employee's plan/appraisal use the search feature by typing in the name of the employee.



Print Snapshot Appraisal Information Page

1. Enter employee name and select the Magnifying Glass icon.



2. On the Search and Select: Employee Name page, the employee name entered in previous step will display. Select Go button to find employee. When the record comes up, select the **radio button** to select record and select the **Select** button.

Search and Select: Employee Name

Cancel Select

Search

Select a field to 'Search By'. Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the '%'; e.g., Smi% or 02%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and firstname followed by the %, e.g. Smith%John%. Select the "Go" button. Select the 'Quick Select' icon next to your selection.

Search By Employee Name Go

Results

Select	Quick Select	Employee Name	EmpNumber
<input type="radio"/>		Employee Name	123456

Cancel Select

3. The next screen shows you all ‘snapshots’ of the employee’s **approved** performance plans, progress reviews, and appraisals for every appraisal year unless additional criteria is used in the search.
 Note: Enter the Appraisal Year to see snapshots for only appraisal year.

MyPerformance

MyBiz+ | Home | Logout

Print Snapshot Appraisal Information Return

Print Snapshot Report

Employee Name

Employee Number

Appraisal ID

Appraisal Year

Type

Find Clear

Employee Name	Employee Number	Appraisal Year	Appraisal ID	Type	Event	Event Completion Date	Reports/Forms
Employee One	295077	2016	277	DoD	DoD Annual Appraisal	01-Mar-2016	
Employee One	295077	2016	277	DoD	DoD Progress Review	09-Dec-2015	
Employee One	295077	2017	277	DoD	DoD Performance Plan	23-May-2016	
Employee One	295077	2017	277	DoD	DoD Progress Review	16-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan - Modified	26-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan	17-Feb-2016	

Return

4. The screen below is an example for the employee shown in the above screen, but with the additional search parameter of Appraisal Year of '2017'. Now it only shows the instances for the original **approved** Performance Plan, and an instance for the performance plan once it was modified and reapproved.

Print Snapshot Appraisal Information Return

Print Snapshot Report

Employee Name: Employee One
 Employee Number: 295077
 Appraisal ID:
 Appraisal Year: 2017
 Type:
 Find Clear

Employee Name	Employee Number	Appraisal Year	Appraisal ID	Type	Event	Event Completion Date	Reports/Forms
Employee One	295077	2017	277	DoD	DoD Performance Plan	23-May-2016	
Employee One	295077	2017	277	DoD	DoD Progress Review	16-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan - Modified	26-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan	17-Feb-2016	

Return

5. To view or print any one of the snapshots listed, select the printer icon next to the instance you want to see. For example if you wanted to see the original approved performance plan and compare it to the modified and reapproved performance plan to see what was modified, you could select the first printer icon, and print that version, then you could come back to this screen and select the printer icon next to the second instance and print that version.

Print Snapshot Appraisal Information Return

Print Snapshot Report

Employee Name: Employee One
 Employee Number: 295077
 Appraisal ID:
 Appraisal Year: 2017
 Type:
 Find Clear

Employee Name	Employee Number	Appraisal Year	Appraisal ID	Type	Event	Event Completion Date	Reports/Forms
Employee One	295077	2017	277	DoD	DoD Performance Plan	23-May-2016	
Employee One	295077	2017	277	DoD	DoD Progress Review	16-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan - Modified	26-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan	17-Feb-2016	

Return

6. Once you select the printer icon, the message the bottom of the screen will ask you if you want to open or save the instance. You can select the **Open** button to open the instance on your screen, or you can select the arrow next to the **Save** button which will show a drop down menu where you can choose to Save, Save As, or Save and Open the instance. You can also cancel this action by selecting the **Cancel** button.

Print Snapshot Appraisal Information Return

Print Snapshot Report

Employee Name: Employee One
 Employee Number: 295077
 Appraisal ID:
 Appraisal Year: 2017
 Type:
Find Clear

Employee Name	Employee Number	Appraisal Year	Appraisal ID	Type	Event	Event Completion Date	Reports/Forms
Employee One	295077	2017	277	DoD	DoD Performance Plan	23-May-2016	
Employee One	295077	2017	277	DoD	DoD Progress Review	16-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan - Modified	26-Sep-2016	
Employee One	295077	2017	277	DoD	DoD Performance Plan	17-Feb-2016	

Return

Do you want to open or save **DoD_Appraisal.PDF** from **warlock.dcpds.cpmos.osd.mil**? Open Save

Save
 Save as
 Save and open

7. Selected 'Open' as an option above, the Performance Plan converts to a Adobe pdf file and displays the form below.

DEPARTMENT OF DEFENSE CIVILIAN PERFORMANCE PLAN, PROGRESS REVIEW AND APPRAISAL			
EMPLOYEE NAME: <i>(Last, First, Middle Initial)</i>	Employee One	DoD ID NUMBER:	1234567890
		APPRAISAL YEAR (YYYY):	2017
PRIVACY ACT STATEMENT			
<p>AUTHORITY: 5 U.S.C. 43, Performance Appraisal; 5 CFR 430.205, Agency Performance Appraisals; 10 U.S.C. 136, Under Secretary of Defense for Personnel and Readiness; and DoDI 1400.25, Volume 431, DoD Civilian Personnel Management System: Performance Management and Appraisal Program; and DoDI 1400.25, Volume 1100, Civilian Human Resources Management Information Technology Portfolio.</p> <p>PRINCIPAL PURPOSE(S): To document performance elements, associated performance standards, progress review(s) and ratings of record.</p> <p>ROUTINE USE(S): Applicable Blanket Routine Use(s) are: Law Enforcement Routine Use, Disclosure When Requesting Information Routine Use, Disclosure of Requested Information Routine Use, Congressional Inquiries Routine Use, Disclosure to the Office of Personnel Management Routine Use, Disclosure to the Department of Justice for Litigation Routine Use, Disclosure of Information to the National Archives and Records Administration Routine Use, Disclosure to the Merit Systems Protection Board Routine Use, and Data Breach Remediation Purposes Routine Use. The DoD Blanket Routine Uses set forth at the beginning of the Office of the Secretary of Defense (OSD) compilation of systems of records notices may apply to this system. The complete list of DoD Blanket Routine Uses can be found online at: http://dpclid.defense.gov/Privacy/SORNsIndex/BlanketRoutineUses.aspx.</p> <p>The applicable system of records notice is DPR 34 DoD, Defense Civilian Personnel Data System, located at: http://dpclid.defense.gov/Privacy/SORNsIndex/DODwideSORNArticleView/tabid/6797/Article/570697/dpr-34-dod.aspx.</p> <p>DISCLOSURE: Voluntary; however, if you are unable or unwilling to complete the administrative portion, your supervisor will complete it to ensure performance review is linked to individual performance, recognition, and awards.</p>			
INSTRUCTIONS FOR COMPLETING THE CIVILIAN PERFORMANCE PLAN, PROGRESS REVIEW AND APPRAISAL			
<p>Cover Sheet (Page 1): Enter the employee's full name, DoD ID number, and the current appraisal year. <i>(Completed by employee or Rating Official/Supervisor.)</i></p> <p>PART A - Administrative Data. <i>(Completed by employee and/or Rating Official/Supervisor.)</i></p> <ol style="list-style-type: none"> Appraisal Period: a. Enter the rating start date of the appraisal cycle. b. Enter the end date of the appraisal cycle. c. Enter the Effective Date of the Rating of Record. NOTE: The DoD Performance Management and Appraisal Program cycle is April 1 - March 31 with effective date June 1. The minimum evaluation period is 90 calendar days. Employee Name: Enter the name of the employee (last, first, middle initial). DoD ID Number: Number found on the back of Common Access Card (NOTE: Do not enter SSN). Position Title and Position Description Number: Enter the official position title and official position description number found in block 15 of SF-50. Pay Plan/Occupational Code/Grade/Step: Enter the employee's pay plan, occupational code (series), grade, and step as of the date the performance plan is established. May be found in blocks 16, 17, 18 and 19 of SF-50. Organization: Enter the name of the employee's organization. Duty Station: Enter the duty station found in block 39 of SF-50. <p>PART B - Acknowledgement of Performance Discussions. <i>(Completed by employee, Rating Official/Supervisor and Higher Level Reviewer in accordance with DoDI 1400.25 Volume 431 and local policy.)</i> Enter full name, signature and date of acknowledgement by employee, rating official/supervisor and higher level reviewer as appropriate to document the communication of performance plan(s), progress review(s), modification(s) and rating(s) of record. If modification(s) to the performance elements and standards are required, enter date modification occurred.</p>			

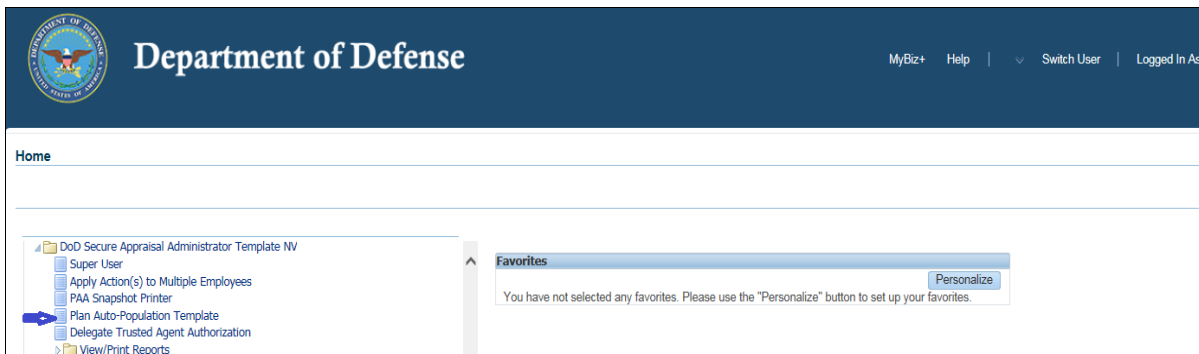
Plan Auto-Population Template

Some information that is similar across DoD is pre-populated within the performance plan when created (i.e., appraisal period start/end date, DoD core values).

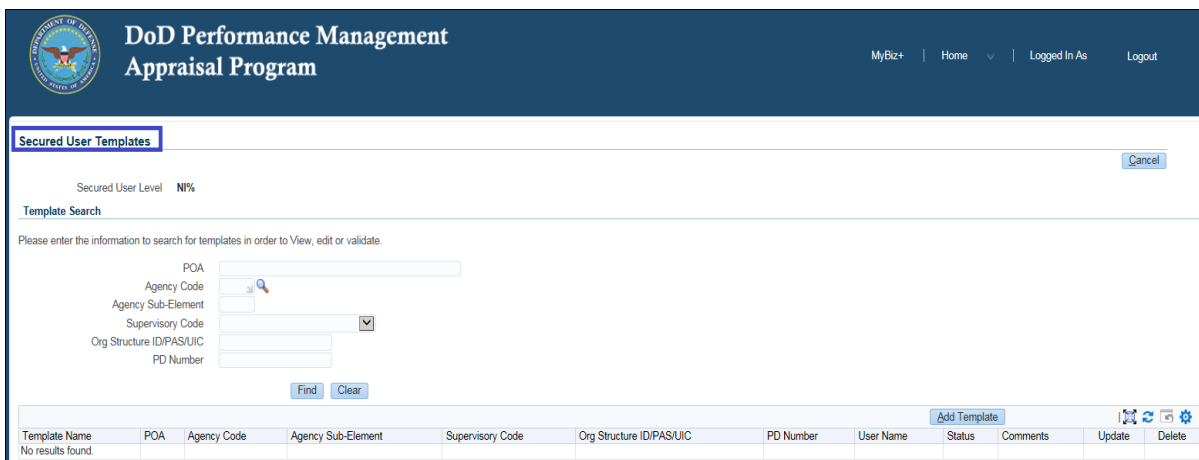
The Auto Population Template functionality takes it a step further. It allows the DoD Secure Appraisal Administrator template NV_PAA responsibility the ability to create a plan template that might include Organizational Mission Goals and/or Performance Elements and Standards. The template will be applied to all plans that fall within the DoD Secure Appraisal Administrator secure responsibility level, such as the UIC or the Organization level. Additional criteria, such as the Supervisory Code can be used to identify a smaller group of individuals. Templates created must be validated for the auto population to take place when the Rating Official or Employee creates the plan.

If a validated template is modified by the DoD Secure Appraisal Administrator, the modifications made will not affect any plans created prior to the modified date. Once the modified template is validated, the modified information will auto population when a new plan is created.

This section provides step by step instructions on how to search, add, modify and validate a template.



1. Select Plan Auto-Population Template link
2. On the Secured User Templates page, a template can be added or searched.



3. To search for a template, enter data in any of the open data fields such as the POA, Agency Code, Supervisory Code, etc., and then select Find button.

Supervisory Code	2-Supervisor or Manager
Org Structure ID/PAS/UIC	4-Supervisor (CSRA)
PD Number	5-Management Official (CSRA)
	6-Leader
	7-Team Leader
	8-Non-Supervisory

If Supervisory Code is used for a search and no template is returned, that means templates for the Supervisory Code entered are not available.

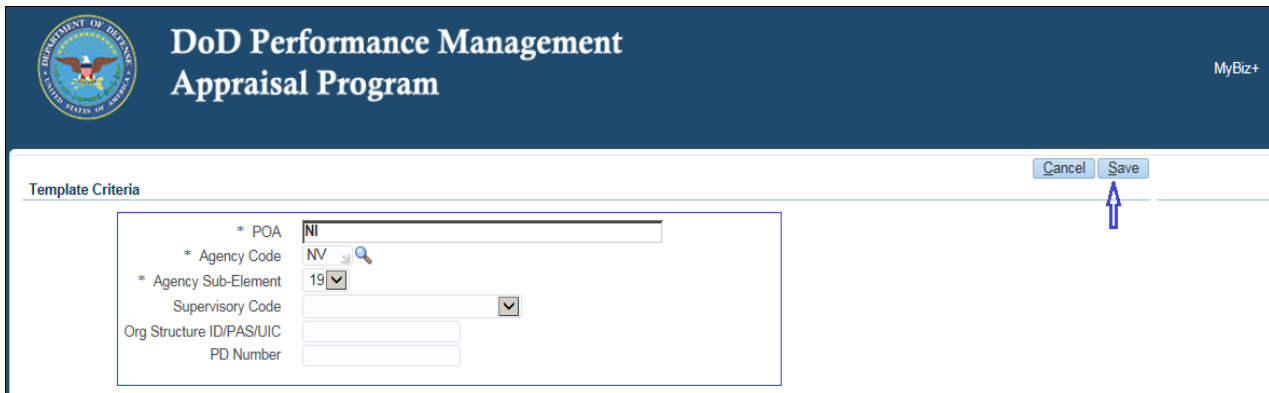
Adding a Template

Note: Security level is based on the DoD Secure Performance Appraisal Administrator as seen below (NI%)

1. Select Add Template button

2. On the Template Criteria page, there are required data fields. User has the option to use additional data fields. The POA data field auto-populates based on the secure user responsibility.

3. Enter required data fields and select Save button. The required data fields are identified with an asterisk.



DoD Performance Management Appraisal Program MyBiz+

Template Criteria Cancel Save

* POA

* Agency Code

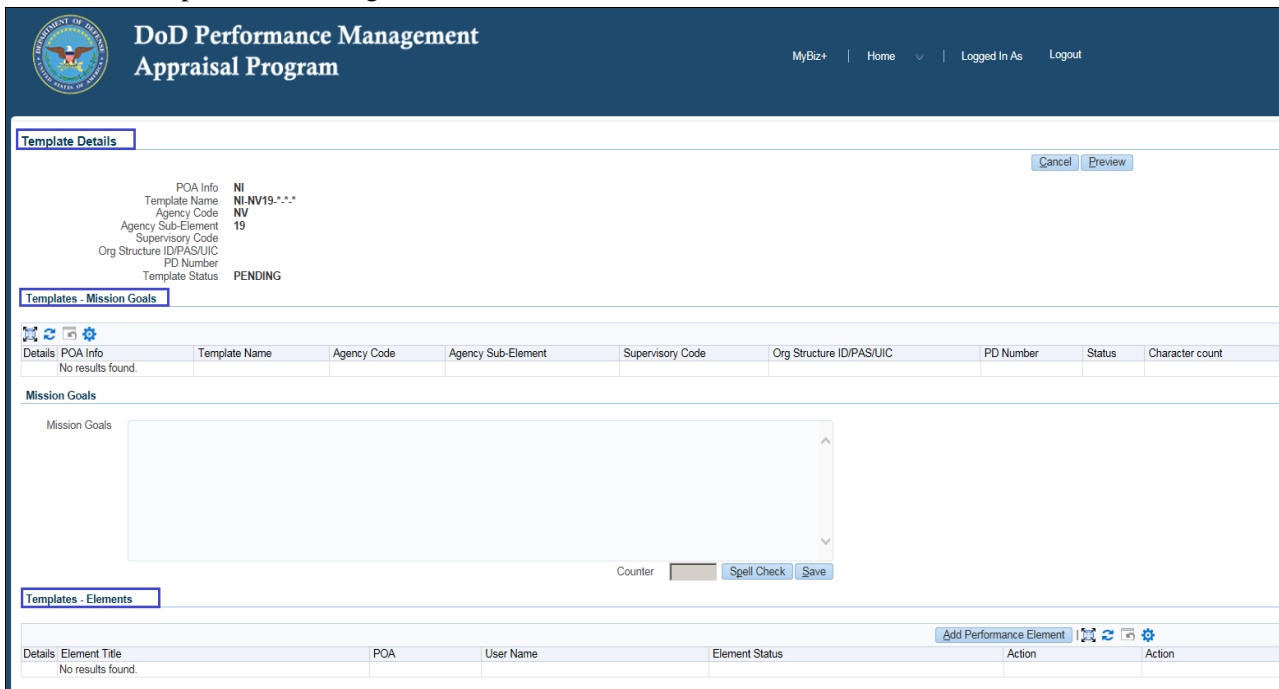
* Agency Sub-Element

Supervisory Code

Org Structure ID/PAS/UIC

PD Number

4. On the Template Details Page, there are 3 sections, Details, Mission Goals and Elements.



DoD Performance Management Appraisal Program MyBiz+ | Home | Logged In As | Logout

Template Details Cancel Preview

POA Info NI
 Template Name NI-NV19-***
 Agency Code NV
 Agency Sub-Element 19
 Supervisory Code
 Org Structure ID/PAS/UIC
 PD Number
 Template Status PENDING

Templates - Mission Goals

Details	POA Info	Template Name	Agency Code	Agency Sub-Element	Supervisory Code	Org Structure ID/PAS/UIC	PD Number	Status	Character count
No results found.									

Mission Goals

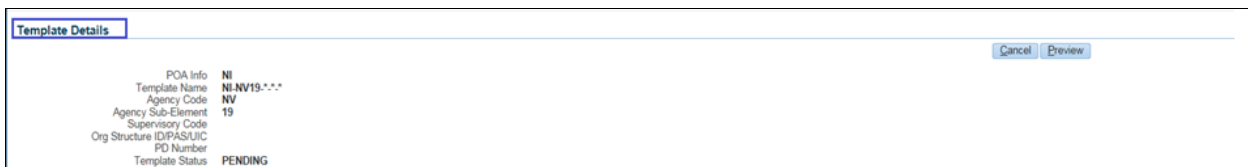
Mission Goals

Counter Spell Check Save

Templates - Elements

Details	Element Title	POA	User Name	Element Status	Action	Action
No results found.						

5. Review the Template Details entered for accuracy. If information is 'not' correct, select the Cancel button, and make necessary corrections. If information is correct, no action required.



DoD Performance Management Appraisal Program MyBiz+ | Home | Logged In As | Logout

Template Details Cancel Preview

POA Info NI
 Template Name NI-NV19-***
 Agency Code NV
 Agency Sub-Element 19
 Supervisory Code
 Org Structure ID/PAS/UIC
 PD Number
 Template Status PENDING

6. Enter Mission Goals. You can also copy and paste information from a word document. To check spelling, select the Spell Check button. A 'Counter' is also available.

Note: The maximum amount of characters for this text box is 1000. If you exceed the allowable amount of characters, a 'truncation' error message will be received.

Templates - Mission Goals

Details: POA Info Template Name Agency Code Agency Sub-Element Supervisory Code Org Structure ID/PAS/UIC
 No results found.

Mission Goals

Mission Goals

Mission Goals for Navy established for all Organizations.

Counter 58 Spell Check Save

7. Select Save button once the Mission Goals have been established.

8. If you want to add a Performance Element, select the Add Performance Element button.

Templates - Elements

Details: Element Title POA User Name Element Status Action Action
 No results found.

Add Performance Element

9. On the Performance Element page, both the Performance Element Title and Performance Elements and Standard(s) are required data fields, indicated by the asterisk.

DoD Performance Management Appraisal Program

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Performance Element

* Performance Element Title

* Performance Element and Standard(s)

(Limit to 1500 characters)

Spell Check Counter

Cancel Save

10. Enter the Performance Element Title and Performance Element and Standard(s).

11. Select Save button.

The screenshot shows the 'Performance Element' form in the DoD Performance Management Appraisal Program. The form has a dark blue header with the program name and navigation links (MyBiz+, Home, Logged In, Logout). The main content area is white and contains two input fields: 'Performance Element Title' with the value 'Element One' and a larger text area for 'Performance Element and Standard(s)'. The text area contains the text 'Enter performance element and standard in this text box. Allowed up to 1500 characters. Use Spell Check functionality for spelling errors. You can also copy and paste from a word document.' Below the text area is a 'Counter' showing '193' and a 'Spell Check' button. There are 'Cancel' and 'Save' buttons in the top right corner, with a blue arrow pointing to the 'Save' button.

12. Select Preview button. This allows you to review all the information entered at this point for the Performance Element.

The screenshot shows the 'Template Details' page in the DoD Performance Management Appraisal Program. The page has a dark blue header with the program name and navigation links (MyBiz+, Home, Logged In As, Logout). The main content area is white and contains several sections: 'Template Details' with a 'Cancel' and 'Preview' button (blue arrow pointing to 'Preview'); 'Templates - Mission Goals' with a table showing 'No results found.'; 'Mission Goals' with a text area containing 'Mission Goals established for all Navy Organizations.' and a 'Counter' showing '58'; and 'Templates - Elements' with a table showing one element: 'Element One' with POA 'NI', User Name 'Edgecomb, Sandra', and Element Status 'PENDING'. There are 'Update' and 'Delete' buttons for this element. At the bottom right, there are buttons for 'Add Performance Element', 'Print', and 'Settings'.

13. On the Template Preview Page, there are three action buttons. The 'Back' button returns user to previous page, 'Save' button saves the template and 'Print' will print information on the page.

DoD Performance Management Appraisal Program

MyBiz+ | Home | Logged In As | Logout

Template Preview

POA Info: NI
 Template Name: NI-NV19-***
 Agency Code: NV
 Agency Sub-Element: 19
 Supervisory Code:
 Org Structure ID/PAS/UIC:
 PD Number:

POA Info: NI
 Template Name: NI-NV19-***
 Agency Code: NV
 Agency Sub-Element: 19
 Supervisory Code:
 Org Structure ID/PAS/UIC:
 PD Number:

Templates - Mission Goals

Mission Goals established for all Navy Organizations.

Templates - Elements

Show All Details | Hide All Details

Details	Element Title	POA	Element Status
Invalid Template		NI	PENDING

POA Agency Code Agency Sub-Element Supervisory Code Org Structure ID/PAS/UIC PD Number User Name Status Comments

14. If satisfied with goals and elements, select the Save button, this will return the user back to the Secured User Templates page. The template created now displays on the table. Updates to the template can be made or the template can be deleted.

DoD Performance Management Appraisal Program

MyBiz+ | Home | Logged In As | Logout

Secured User Templates

Secured User Level: NI%

Template Search

Please enter the information to search for templates in order to View, edit or validate.

POA:
 Agency Code:
 Agency Sub-Element:
 Supervisory Code:
 Org Structure ID/PAS/UIC:
 PD Number:

Find Clear

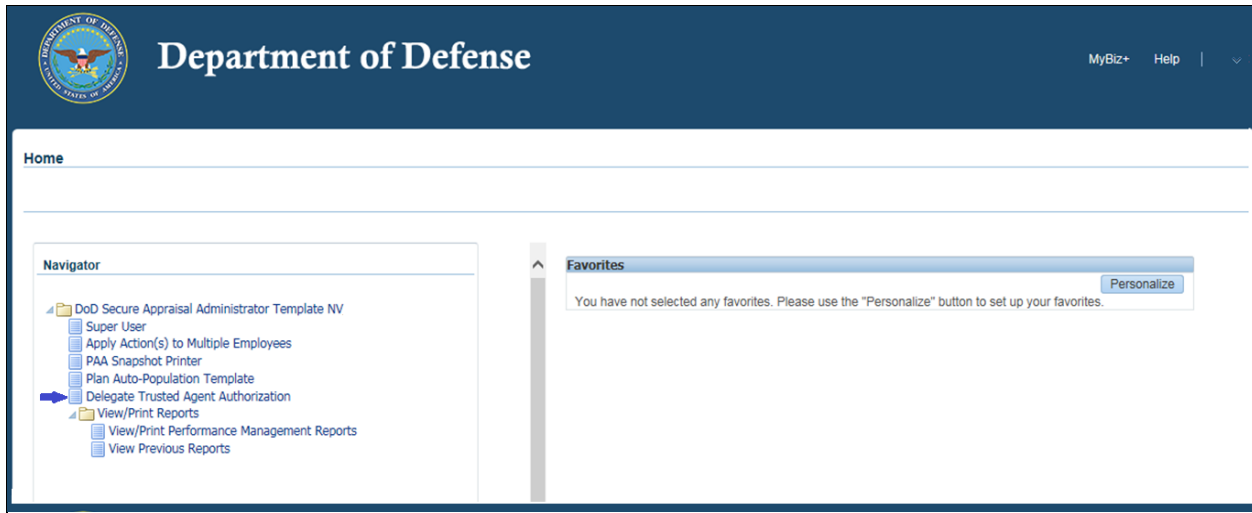
Template Name	POA	Agency Code	Agency Sub-Element	Supervisory Code	Org Structure ID/PAS/UIC	PD Number	User Name	Status	Comments	Update	Delete
NI-NV19-***	NI	NV	19				Edgecomb, Sandra	VALID		Update	Delete

Templates can now be used to auto-populate data when creating a performance plan by the Rating Official or employee.

Delegate Trusted Agent Authorization

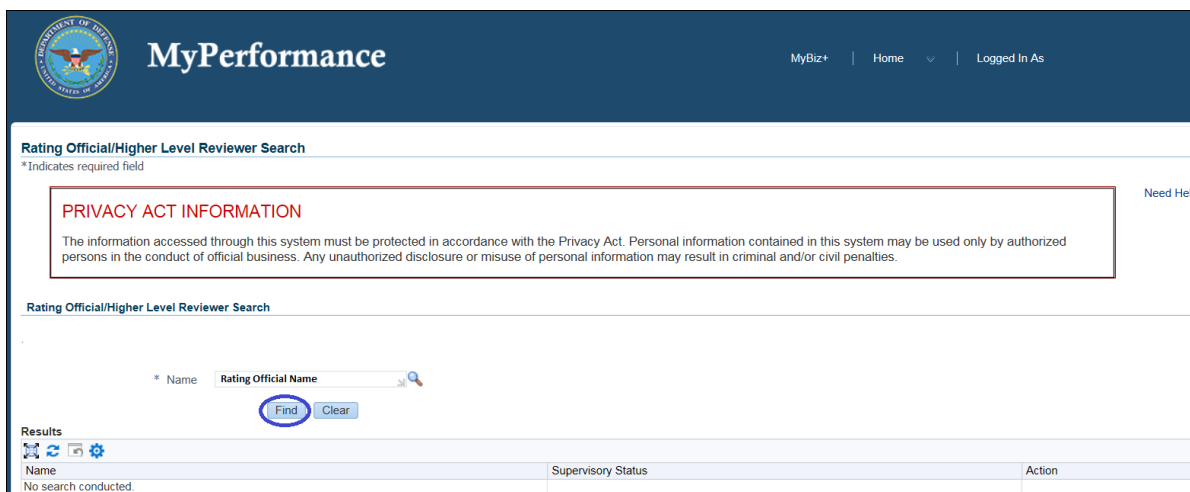
The Delegate Trusted Agent Authorization allows individuals with a DoD Secure appraisal Admin Temp user to delegate trusted agent(s) on behalf of a Rating Official (RO) or Higher Level Reviewer (HLR). Persons using this authorization must first obtain written delegation of authority from the Rating Official or Higher Level Reviewer. Based the written delegation of authority, individuals can be assigned to act as the trusted agent on behalf of the RO or HLR for employees identified by the RO and HLR within MyPerformance for the purpose of documenting their decisions to performance management matters.

1. Select Delegate Trusted Agent Authorization link



Search (Rating Official or Higher Level Reviewer Search Page)

2. Enter the Rating Official or Higher Level Reviewer that authorized the trusted agent assignment.



3. Select the Find button or the 'magnifying glass' icon.
4. Under the results table, select the **Go** button under the Action column for the Rating Official or Higher Level Reviewer.

Rating Official/Higher Level Reviewer Search

* Name:

Results

Name	Supervisory Status	Action
Rating Official Name	Supervisor or Manager	<input type="button" value="Go"/>

5. Identify a Trusted Agent Role – use drop down arrow to select role, the role will be Rating Official or Higher Lever Reviewer. Select role and then select **Go** button.

Trusted Agent Role

* Role:

* System Type:

6. Select Rating Official from list.

Note: Notice the System Type. There could be different views if the hierarchy was changed within the performance tool. If Rating Official or Higher Level Reviewers were changed in the performance tool in addition to Self-Service Hierarchy the user will see DoD Performance Management Appraisal Program. If the hierarchy was changed within the performance tool, the list of values for employee names to select from may be different.

Trusted Agent Role

* Role:

* System Type:

[Return to Search Page](#)

7. Select [+ Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#) link. On this page, trusted agent assignments and terminations of existing assignments can be made.

[+ Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#)

Rating Official Delegation Results

Select All | Select None

Select Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
----------------	---------------	-----------------	--------------	--------------------	------------	----------	--------

Assign Trusted Agent

1. Enter Trusted Agent Name – this is a required field. This is the name to the individual that is being assigned as Trusted Agent or a current Trusted Agent assignment being modified.
2. Enter Start Date - this date is a required field. The date can be a future date, but not earlier than the current date.
3. Enter End Date. The End Date is optional - An End Date can be entered to limit the assignment period. If entered, the end date cannot be less than the current date or the Start Date, whichever is greater.
4. Select employee(s) under the Select column the Results table for whom you want to assign the Trusted Agent authorization.
5. Select the Apply button.

Trusted Agent Role

* Role: Rating Official

* System Type: Self-Service Hierarchy

Hide Manage Assignment of Trusted Agent for Selected Employee(s)
* Indicates required field

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name:

* Start Date:

End Date:

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

> Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select All | Select None

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	>	Employee One	210716	General Counsel NV1230571 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	>	Employee Two	222269	CNI, SW SDIEGO NV5200242 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	>	Employee Three	242457	MSC CIVMARS EAST NV3362381 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>

6. Confirmation message received. Read message and select **Acknowledge** button.

MyPerformance
MyBiz+ | Home | Logged In As

Confirmation

I certify that the Rating Official or Higher Level Rater has provided written authorization for me to take this action.

↑

7. The Results table will display employee records with trusted agent assignments and start date.

Rating Official Delegation Results								
Select All Select None								
Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	>	Employee One	222269	CNI, SW SDIEGO NV5200242 01	Trusted Agent Name	20-Jun-2017		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	>	Employee Two	245324	MSC CIVMARS EAST NV3362381 01	Trusted Agent Name	20-Jun-2017		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	>	Employee Three	251594	MSC CIVMARS WEST NV3362383 01	Trusted Agent Name	20-Jun-2017		Update <input type="button" value="Apply"/>

[Return to Search Page](#)

10. To return to the search page, select the ‘Return to Search Page’ button.

Terminate Trusted Agent

The Results table will display employees based the criteria previously entered under Rating Official Name and Role. The trusted agent for each employee can be identified individually or assigned in mass, select the link above the table.

1. Enter End Date - The end date entered will take affect the end of day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date. Once an end date is entered, a new row will be shown for that employee to allow entry of another Trusted Agent assignment.
2. Select employee(s) under the Select column the Results table. **Note:** End Date must be blank.
3. Select the ‘Apply’ button.

[Return to Search Page](#)

<p>Assign Trusted Agent</p> <p>To assign a Trusted Agent:</p> <ol style="list-style-type: none"> 1. Enter Trusted Agent Name 2. Enter Start Date Tip: You cannot enter a past date for Start Date. 3. Optionally, enter an End Date to limit assignment period 4. Select employee(s) from results table below 5. Select 'Apply' button <p>* Trusted Agent Name <input type="text"/></p> <p>* Start Date <input type="text"/></p> <p>End Date <input type="text"/></p> <p><input type="button" value="Clear"/> <input type="button" value="Apply"/></p>	<p>Terminate Trusted Agent</p> <p>To terminate a Trusted Agent:</p> <ol style="list-style-type: none"> 1. Enter End Date Tip: The End Date cannot be earlier than the Start Date. 2. Select employee(s) from results table below 3. Select 'Apply' button <p>* End Date <input type="text" value="10-Aug-2017"/></p> <p>End date must be current or future date.</p> <p><input type="button" value="Apply"/></p>
---	---

[Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#)

Rating Official Delegation Results								
Select All Select None								
Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	>	Employee One	210716	General Counsel NV1230571 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	>	Employee Two	222269	CNI, SW SDIEGO NV5200242 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	>	Employee Three	242457	MSC CIVMARS EAST NV3362381 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>

4. Select ‘>’ arrow to see detailed information about the employee and trusted agent history. Select the ‘<’ arrow to collapse.
5. To return to the search page, select the ‘Return to Search Page’ button.

View/Print Performance Management Reports

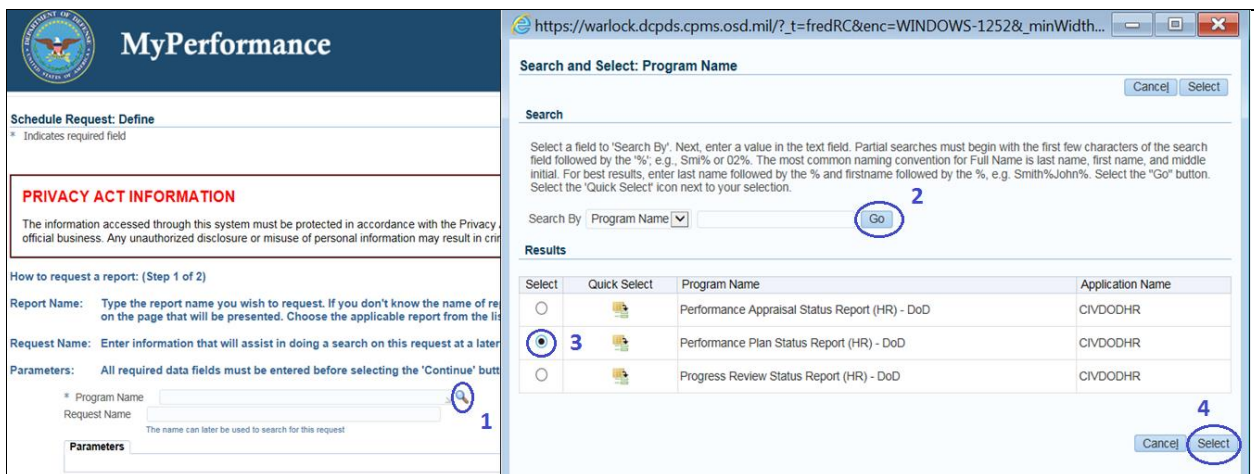
There are reports available for the performance plan status, progress review status, annual appraisal, etc.

1. Select **View/Print Performance Management Reports** link located under 'View/Print Reports'.



2. On the 'Schedule Request: Define Page', there are four steps to complete.

- Select **magnifying glass** icon next to the 'Program Name' field
- On the Search and Select: Program Name Page, select the **Go** button
- All available reports will display under the Results table. Select **radio button** for the report ordered.
- Select the **Select** button



3. Once you select a report the screen will display the report name in the box next to the words ‘Program Name’. To assist in distinguishing report from others, enter a request name in the ‘Request Name’ text box. Select **Continue** button.

Schedule Request: Define
* Indicates required field

PRIVACY ACT INFORMATION
The information accessed through this system must be protected in accordance with the Privacy Act of 1974. Personal information contained in this system may be used only by authorized persons in the conduct of official business. Any unauthorized disclosure or misuse of personal information may result in criminal and/or civil penalties.

How to request a report: (Step 1 of 2)

Report Name: Type the report name you wish to request. If you don't know the name of report, select the search icon to begin the search. Select the 'Go' button on the page that will be presented. Choose the applicable report from the list.

Request Name: Enter information that will assist in doing a search on this request at a later time.

Parameters: All required data fields must be entered before selecting the 'Continue' button.

* Program Name Performance Appraisal Status Report (HR) - DoD
Request Name 2016 Appraisals - RO Navy
The name can later be used to search for this request

Parameters

4. Identify Parameters

The bottom of the screen you will see a ‘Parameters’ section that shows many items you can use to narrow your report down to reflect only those records you are looking for. There is one required parameter for all reports which is the ‘Appraisal Year’. You will not be able to run a report that lists plans, progress reviews or appraisals across appraisal years at this time, you can only choose one year at a time for a report.

Even though there is only one required field, in the blue writing under the word ‘Parameters’, it will tell you that you need to use at least one additional parameter when submitting the report. It then lists all the additional parameters that will meet this requirement. If you use only two parameters and don’t get any results, try using three parameters.

5. Once you fill in all the parameters you want, select the **Continue** button or the **Cancel** button to cancel out of running the report.

Listed below this screen shot is a detailed explanation of the parameters.

Department of Defense

Schedule Request: Define

* Indicates required field

PRIVACY ACT INFORMATION
The information accessed through this system must be protected in accordance with the Privacy Act of 1974. Personal information contained in this system may be used only by authorized persons in the conduct of official business. Any unauthorized disclosure or misuse of personal information penalties.

How to request a report: (Step 1 of 2)

Report Name: Type the report name you wish to request. If you don't know the name of report, select the search icon to begin the search. Select the 'Go' button on the page that will be presented. Choose the applicable report from the list.

Request Name: Enter information that will assist in doing a search on this request at a later time.

Parameters: All required data fields must be entered before selecting the 'Continue' button.

* Report Name Performance Appraisal Status Report (HR) - DoD
Request Name 2016 Appraisals - RO Navy
The name can later be used to search for this request.

Parameters
For this report we need at least one of these additional parameters used when submitting the report: Rating Official, SOID, Agency Group, Organization Name, UIC, PAS Code, Organization Structure ID. This is to prevent a report that will run for a very long time error if you do not use one of these additional parameters along with the required parameter(s). In that event there is a similar message in view requests, view details, diagnostic region OR in the specific request log.

Required Field Appraisal Effective Year (YYYY) 2016
Rating Official RO Navy
Higher Level Reviewer
Current Status Equals
Current Status DOES NOT EQUAL
Performance Plan Status EQUALS
Perf Plan Status DOES NOT EQUAL
Appraisal Assessment and Rating Status
Employee Name
Employee Number
SOID
SOID
Agency Group
Agency Group
Agency Group
Organization Name
UIC
UIC
UIC
PAS Code
Organization Structure ID

Cancel Continue

- **Appraisal Effective Year (YYYY):** This is the four digit year that represents the Appraisal year. **This is a required parameter for every report.**
- **Rating Official:** If you want a report that lists all plans for the Performance Plan Status Report, or all progress review for the Progress Review Status Report, or all appraisals for the Performance Appraisal Status Report, that are under a particular rating official, enter their name in this parameter using last name, first, middle initial
- **Higher Level Reviewer:** If you want a report that lists all plans for the Performance Plan Status Report, or all progress review for the Progress Review Status Report, or all appraisals for the Performance Appraisal Status Report, that are under a particular higher level reviewer, enter their name in this parameter using last name, first, middle initial
- **Current Status Equals:** If you want a report that shows all appraisals in a particular status such as 'Annual Appraisal in Progress', or 'Annual Review Approved by RO', then you could choose this parameter and use only one status for the Performance Appraisal Status Report. The statuses may be different depending on which report you have chosen to run.
- **Current Status DOES NOT EQUAL:** If you want a report that shows all appraisals EXCEPT those that are in a particular status such as 'Annual Appraisal in Progress', or 'Annual Review Approved by RO', then you could choose this parameter for the Performance Appraisal Status Report, and you would get all appraisals EXCEPT the status you entered. The statuses may be different depending on which report you have chosen to run.
- **Performance Plan Status EQUALS:** If you want a report showing only those performance plans that are in one particular status such as 'PENDING' or 'APPROVED', you would use this parameter.
- **Appraisal Assessment and Rating Status:** If you want a report showing only those appraisals that are in one particular assessment and rating status such as 'Completed' or 'In Progress', you would use this parameter.
- **Employee Name:** If you want a report on only one employee, enter the employee's last, first, and middle initial into the box.
- **Employee Number:** This is a unique number assigned to every employee in the Defense Civilian Personnel Data System (DCPDS) that is generally only used by the personnel community. It is NOT the DoD ID, EDIPI, or SSN.

- **SOID:** This is a two digit code that represents the servicing Human Resources Office for personnel records. If you wanted a report for employees that are in a particular HRO, you would use this 2 digit parameter.
- **Agency Group:** This is a two digit code that represents the agency such as 'NV' for Navy or 'DD' for Department of Defense. If you wanted to pull only those employees in a particular Agency you would use this code.
- **Organization Name:** This is the official clear text wording that is associated with a particular Unit Id Code. It is recommended that you NOT use this parameter unless you know exactly what this wording is. Instead use the 'UIC' parameter below if you want to run a report for a particular UIC.
- **UIC:** This is the six digits Unit Identification Code. If you want to pull a report for only one UIC, then you would use this parameter and enter the UIC.
- **PAS Code:** This is a four digit code that is a combination of the agency code and certain digits of the UIC. Do not use this parameter.
- **Organization Structure ID:** This is a code that can be from one to seven digits that represents the levels of the organization below the UIC level. If you want to pull a report for just a particular division, branch, section, etc. below the UIC level you would use this parameter with the code that represents that particular level of the organization.

Schedule Request Review Page

6. After you have chosen which parameters you want for this report and selected the Continue button, the next screen shows what you chose for search parameters.

7. If they are correct, select the **Submit** button. If they are not correct, you can go back to the parameters screen by selecting the Back button, or you can cancel the entire process of running the report by selecting the Cancel button:

Department of Defense MyBiz Help Home

Schedule Request: Review Cancel Back Submit

How to complete Step 2 of 2: Cancel Back Submit

Verify the information located within the "Parameters"
If the information is correct, select the "Submit" button to continue.
If you wish to cancel this request, select the "Cancel" button.

Name

Concurrent Program Name Performance Appraisal Status Report (HR) - DoD
Request Name 2016 Appraisals - RO Navy

Parameters

Appraisal Effective Year (YYYY) 2016
Rating Official RO Navy
Higher Level Reviewer
Current Status Equals
Current Status DOES NOT EQUAL
Performance Plan Status EQUALS
Perf Plan Status DOES NOT EQUAL
Appraisal Assessment and Rating Status
Employee Name
Employee Number
SOID
SOID
Agency Group
Agency Group
Agency Group
Organization Name
UIC
UIC
PAS Code
Organization Structure ID

Schedule

Scheduled to Run As Soon As Possible
Recurrence Never Repeats
Increment Dates No
Recalculate Default Parameters No

Layout

Layout Settings

For Language	Template Name	Language	Output Format
American English	CIVAPPR_PASRHR	English, United States	EXCEL

Notifications

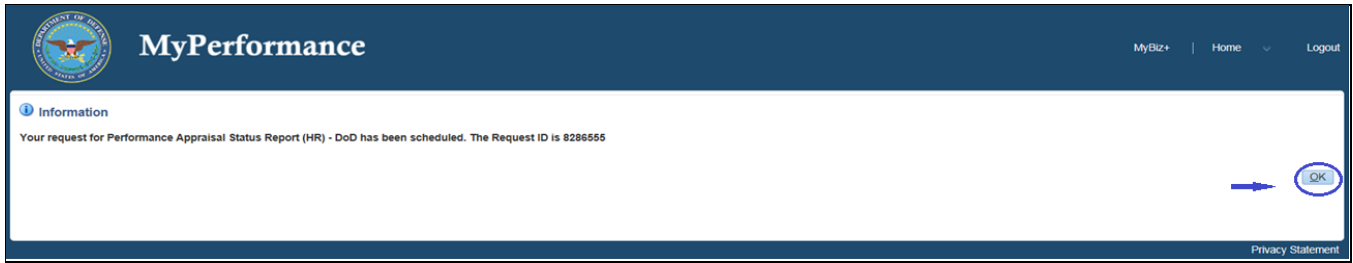
Recipients

Printer

Print Style All
Output Files Save
Printer Options
Printer Copies Language
noprint 1 All languages

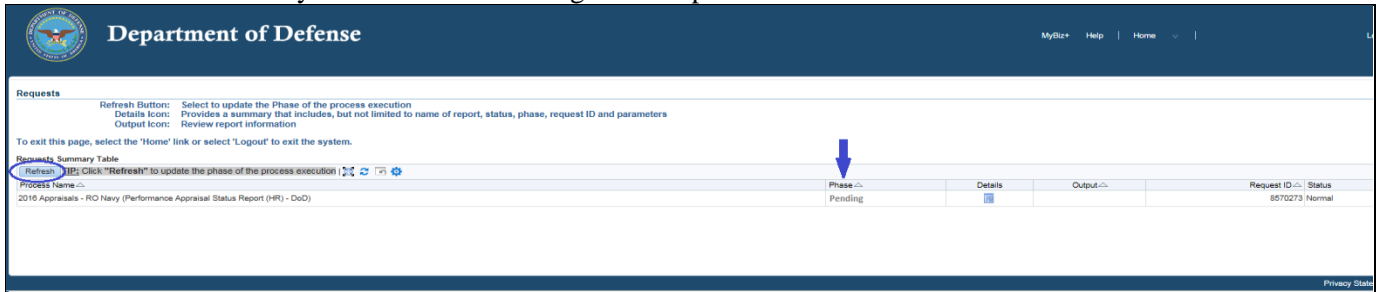
Cancel Back Submit

Information Message Received – report has been requested and has been scheduled to run.

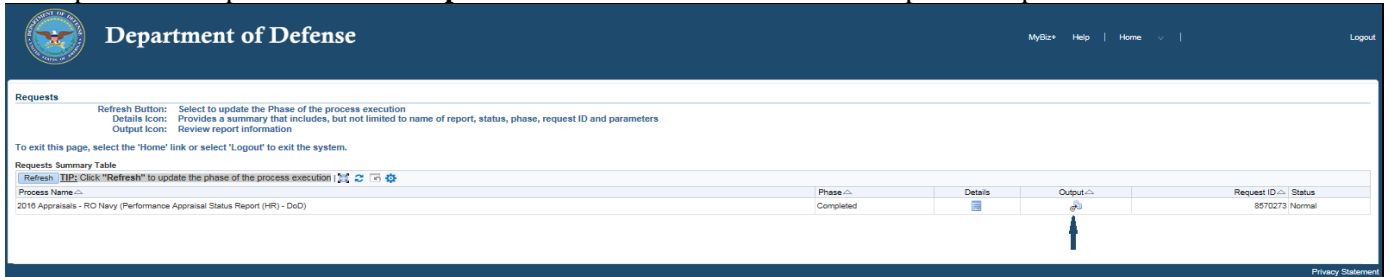


8. Select the **OK** button

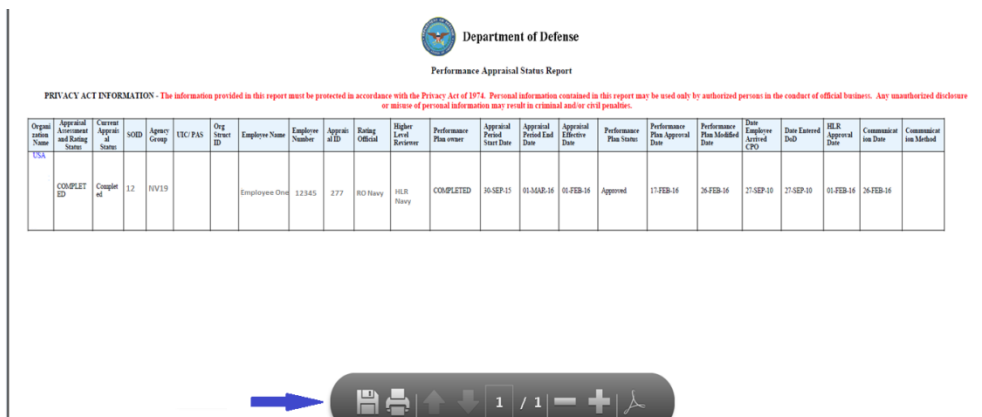
The next screen lists the name of the report you ran under the 'Process Name' column. When you first see this screen the report might be in a 'Pending' or 'Running' phase under the 'Phase' column. If that is the case, select the **Refresh** button until you see the words change to Completed under the 'Phase' column.



9. Report has completed - select **Output** icon under the 'Phase' column to open the report in PDF format.



This is an example of what the report looks like once it's open. You can Save or Print the report using the Adobe Acrobat icons.



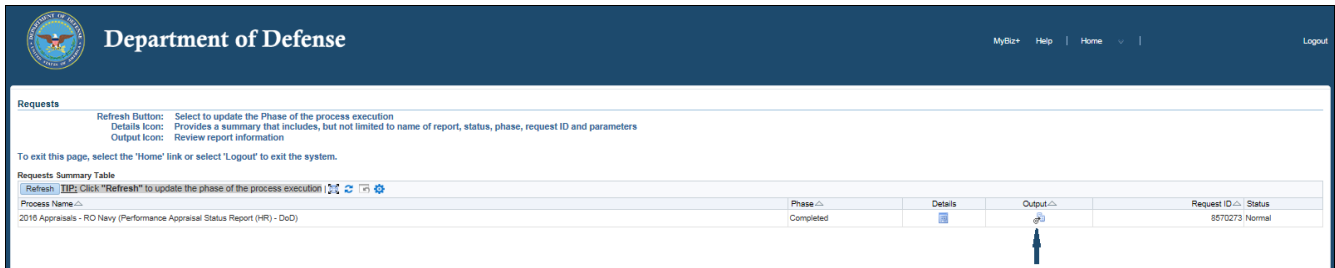
View Previous Reports

The view previous reports functionality allows you to view or print reports that were previously submitted.

1. Select View Previous Reports



2. Select **Output** icon to open report.



A list of all the reports previously ordered will display the report name you entered when you initiated the report and the report title in parenthesis.