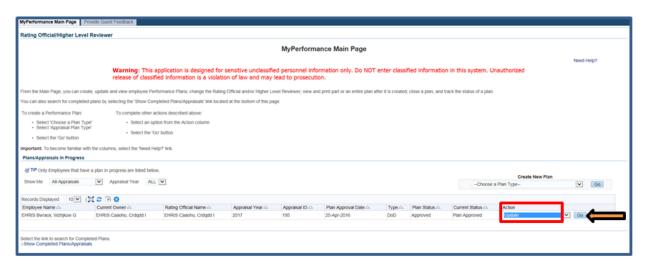
## **DOCUMENTING A PROGRESS REVIEW**

## Rater/Supervisor

1. NOTE: The Current Status is Plan Approved



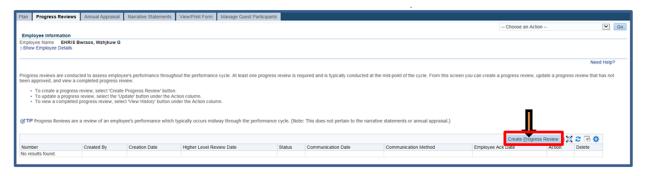
2. Select Acknowledge.



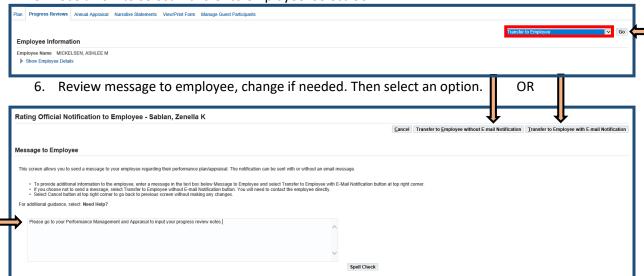
3. Select Progress Review tab.



4. Select Create Progress Review.



5. Use arrow to select Transfer to employee. Select Go.

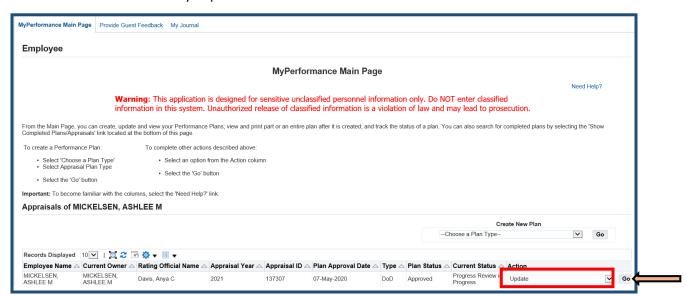


7. Your Action status now says View.

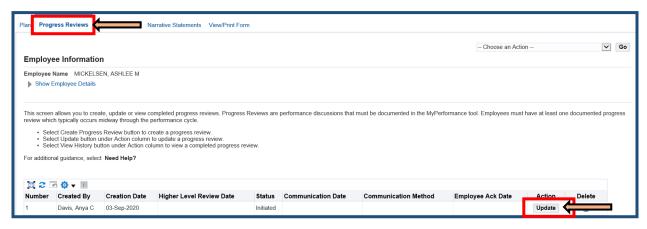


# Ratee/Employee

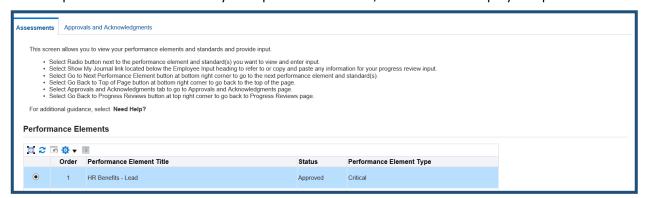
8. Your Action status says Update. Select Go.



9. Select the Progress Review tab and then Update.



10. There is a radial button for each critical element. You can input your comments in order or select a specific critical element for your input. Once selected, scroll down to Employee Input.



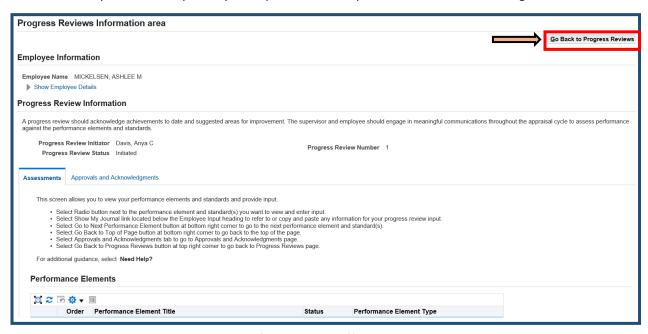
11. Type your input here.



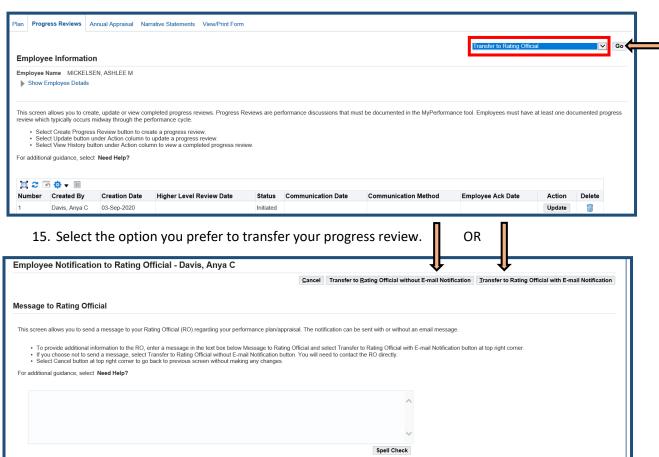
12. When completed with your input, either scroll down and select Go to Next Performance Element, or scroll up to select a specific critical element.



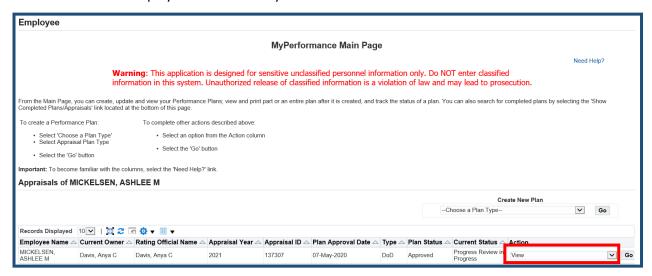
13. When you have completed your input, scroll to top and select Go Back to Progress Reviews.



14. Click on the arrow to select Transfer to Rating Official, then select Go.

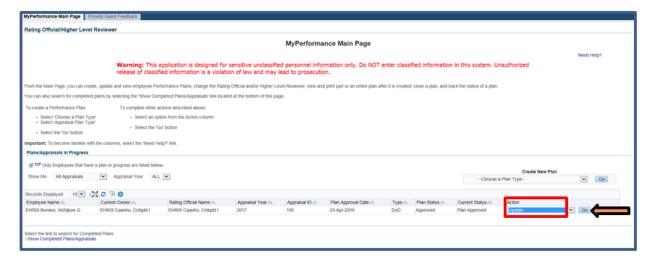


16. NOTE: The Employee Action now says View.



# Rater/Supervisor

17. Action now says Update. Select Go.



18. Select Acknowledge.



19. Select Progress Review tab.



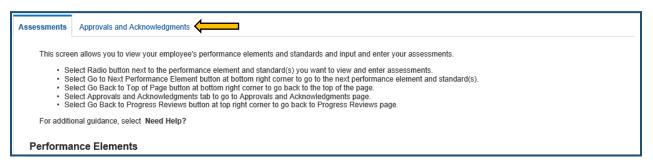
20. Select Update.



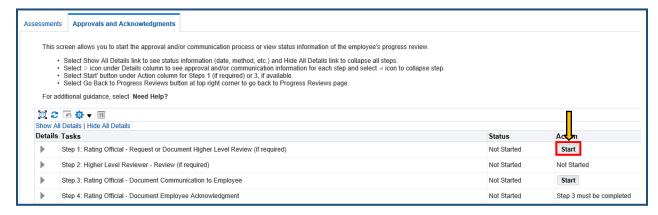
21. You will see all the critical elements you created for the employee. There is a radial button to the left of each element. The button selected is the element you will be adding comments for. You will do this in the **Rating Official Assessment** block. When you are finished with a critical element, you can either select the **Go to Next Performance Element** at the bottom or scroll to the top and specifically select the order in which you would like to add comments to critical elements.



22. When you have completed your assessment for each critical element, scroll up to the top of your screen. You will see two tabs. You have been working under the **Assessment** tab. Click on the **Approvals and Acknowledgments** tab.

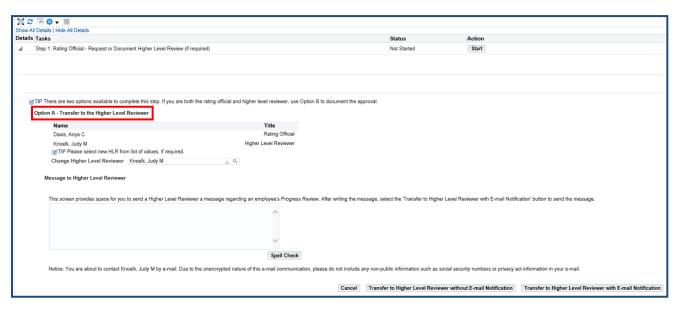


23. The system takes you through the HLR requirement.



24. You will see 2 options: **Option A** & **Option B**. Option A will send the review to the HLR. This step is NOT necessary unless your HLR requires it. You may use Option B and under **Method of Review** select **Face**. Select a **Review Date** and **Save**.

If you select **Option A**, you have the option to send a message to the HLR and then transfer to them with or without an e-mail notification.



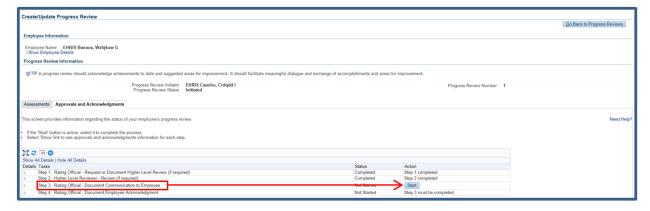
#### **OPTION B**



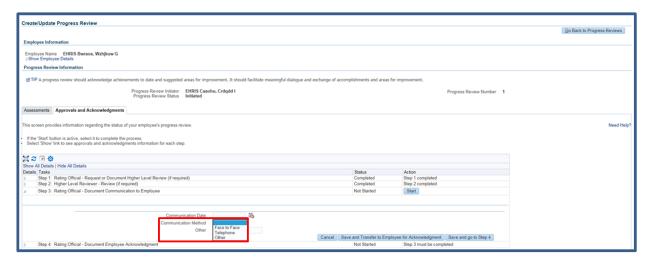
25.



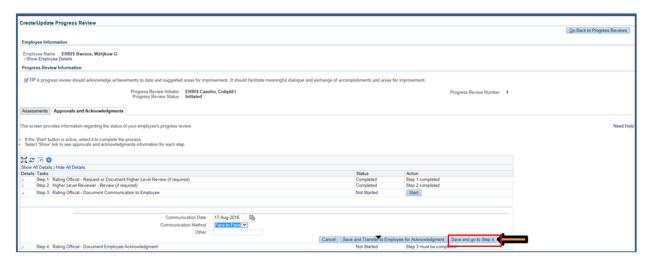
26. This step is where you initiate communication with the employee.



27. It is recommended you have a face to face conversation with them about their performance.



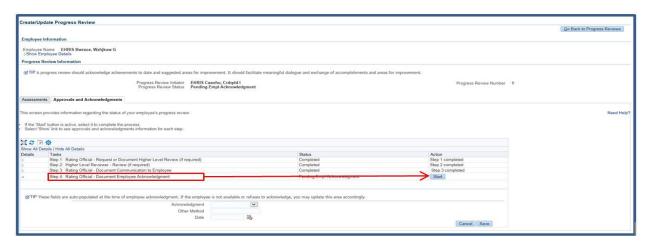
28. You can Save and Transfer to Employee for Acknowledgment or Save and go to Step 4. If you Save and go to Step 4, go to step 29. If you Save and Transfer to Employee for Acknowledgment, skip to step 35.



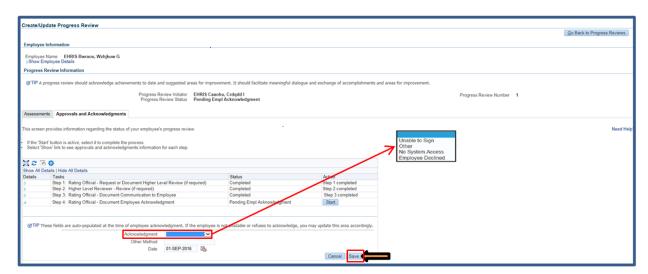
29.

Confirmation	
Are you sure you want to go to Step 4?	
	No Yes

30. Document Employee Acknowledgment.



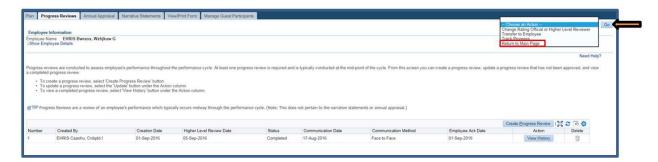
31.



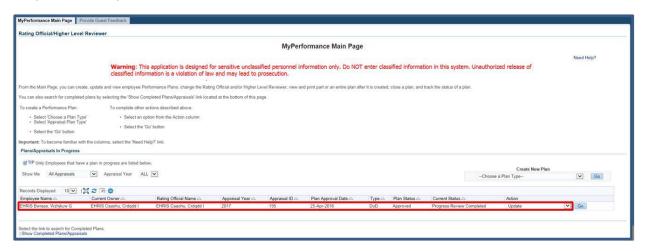
32. Select Go Back to Progress Reviews.



33. The progress review has been completed, from the **Choose an Action** drop-down menu, select **Return to Main Menu** and select **Go** button.

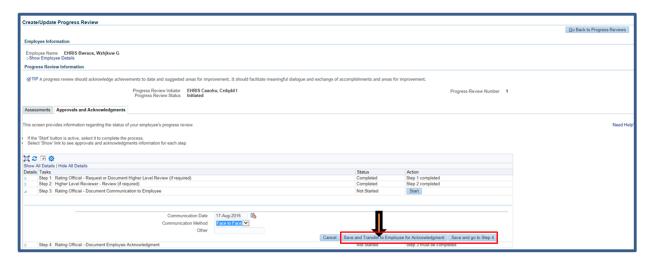


34. The **Current Status** is **Progress Review Completed** and the Rating Official still has ownership of the performance plan.

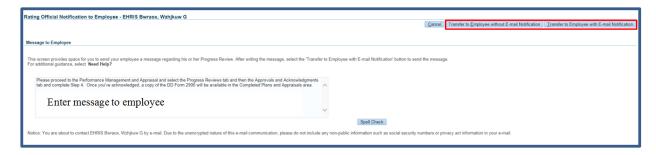


The Progress Review is COMPLETE, unless you are transferring to the employee for acknowledgment in step 35.

35. This is where you have decided to Save and Transfer to Employee for Acknowledgment.



36. Select whether you want to transfer with or without e-mail notification.

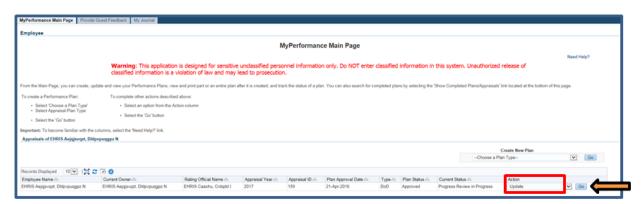


37. Once transferred, you will receive a confirmation message. **Employee Acknowledgment steps** are next.



# Ratee/Employee

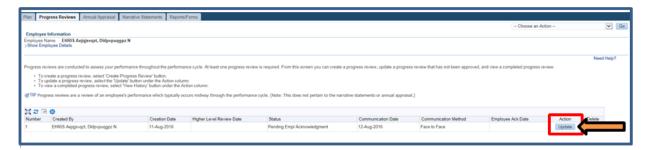
38. Employee Acknowledgment.



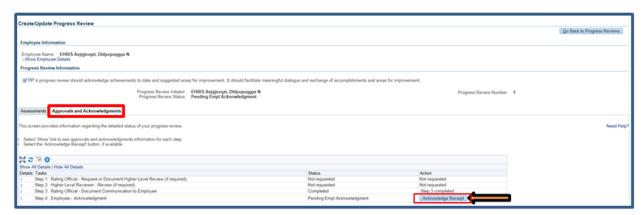
39. The Plan Details page is displayed. Select the Progress Review tab.



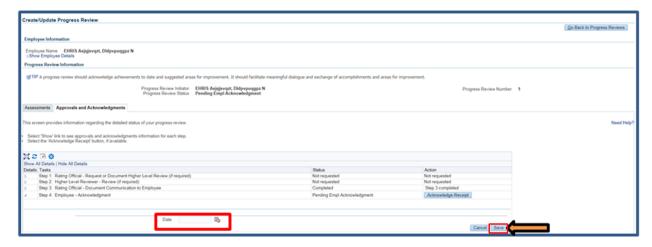
## 40. Select Update.



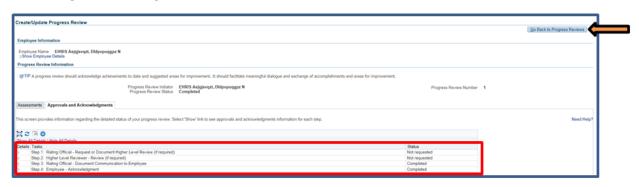
41. Select Approvals and Acknowledgments tab. The Acknowledge Receipt button will be available.



42. You can manually enter the date or use the calendar icon. Click Save.



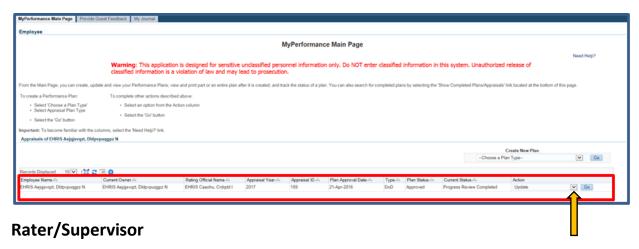
43. You have acknowledged receipt of your progress review. Select **Go Back to Progress Reviews** button to go back to *Progress Reviews* tab.



44. The action now reflects **View History**. Now select **Choose an Action,** drop down arrow depicted in the red box below. Then select **Return to Main Page**. Then select the **Go** button.



45. The current status reflects *Progress Review Completed*. **Employee** still has ownership of the performance plan. Select the arrow under **Action** and select transfer to **Rating Official**. Then select **Go**.



46. The **Current Status** is **Progress Review Completed** and the Rating Official still has ownership of the performance plan.

