New Performance Plan

Building a NEW plan

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

https://bantamemp.dcpds.cpms.osd.mil/dcpdsportal-reg03/profile.jsf#

MyBiz+

Other DCPDS Applications ▾   ★ Favorites ▾   Customer Support ▾   ❓ Help ▾   Logout

Add | Reset | Done 💬

▪▪ Key Services   ⊗ ⇄

Manage Key Services 💬

MyPerformance

Request Employment Verification

Civilian Career Report

Update Contact Information

Update Professional Development

SF50 Personnel Actions

Update MySupervisor

Civilian Expeditionary Workforce (CEW)

Civilian Career Brief

Manager Functions

    Performance Management and Appraisal ⬅

    Apply Action(s) to Multiple Employees

    Manage MyPerformance Trusted Agent Authorization

    View/Print Performance Management Reports

    View Previous Requests

    CIV Fill Request Status

Update MyTeam

    Add Employee

    Remove Employee
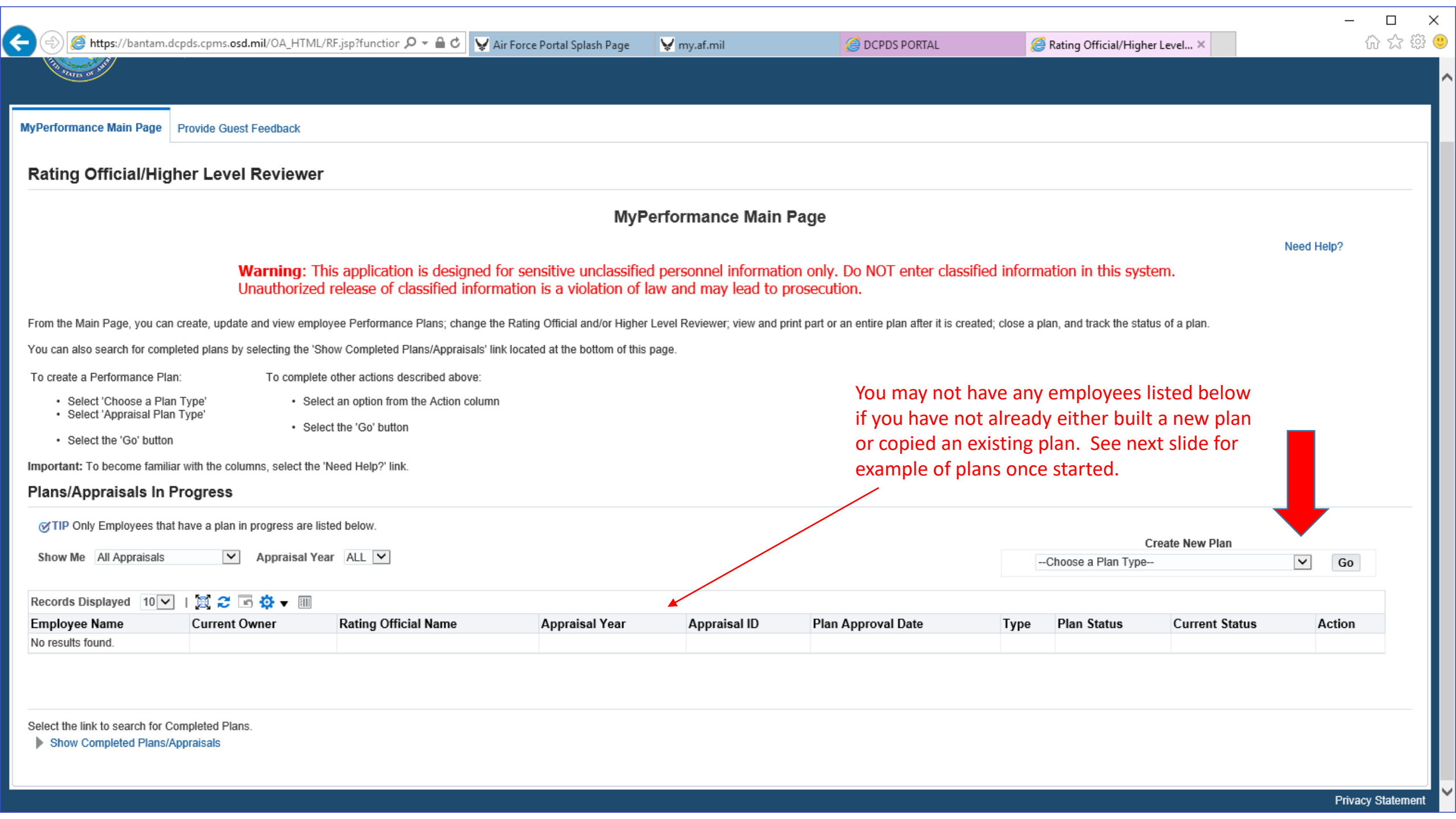
    Process Employee Requests

▪▪ Other DCPDS Tools   ⊗ ⇄

DCPDS Navigator Homepage

Add HR Region Associations
DCPAS Data Dictionary
MyBiz+ for HR Professionals REG03

MyPerformance Main Page | Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

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

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.

You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:

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

To complete other actions described above:

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

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

Plans/Appraisals In Progress

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

You may not have any employees listed below if you have not already either built a new plan or copied an existing plan. See next slide for example of plans once started.

Create New Plan

Show Me [All Appraisals ▾] Appraisal Year [ALL ▾] --Choose a Plan Type-- [▾] [Go]
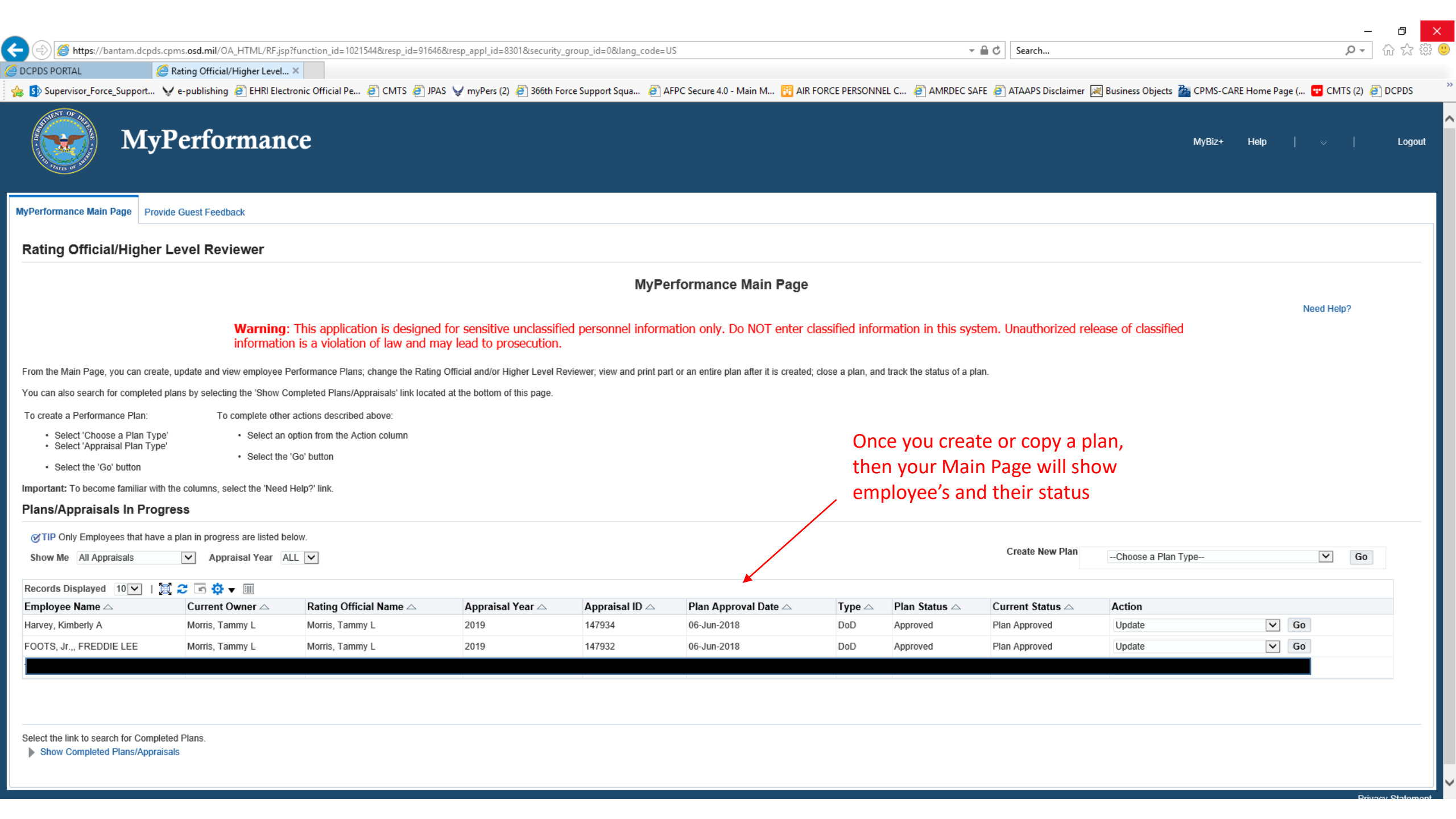
Records Displayed [10 ▾] | 📰 🔁 🔄 ⚙ ▾ 🗔

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
No results found.									

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

https://bantam.dcpds.cpms.osd.mil/OA_HTML/RF.jsp?function_id=1021544&resp_id=91646&resp_appl_id=8301&security_group_id=0&lang_code=US

Search...

MyPerformance

MyBiz+   Help | ∨ | Logout

MyPerformance Main Page   Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

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To create a Performance Plan:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'

- Select the 'Go' button

To complete other actions described above:

- Select an option from the Action column

- Select the 'Go' button

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

Once you create or copy a plan, then your Main Page will show employee's and their status

Plans/Appraisals In Progress

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

Show Me All Appraisals ∨   Appraisal Year ALL ∨

Create New Plan   --Choose a Plan Type-- ∨   Go

Records Displayed 10 ∨ | ⛶ ↻ ⬚ ⚙ ▼ ▦

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action	
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go

Select the link to search for Completed Plans.

▶ Show Completed Plans/Appraisals

Privacy Statement

MyPerformance

MyBiz+   Help | ⌄ | Logout

MyPerformance Main Page   Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

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You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:
- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button

To complete other actions described above:
- Select an option from the Action column
- Select the 'Go' button

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

2nd

If you do not see the employee you're looking for listed on the page, then "Create a New Plan".

Plans/Appraisals In Progress

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

Show Me [All Appraisals ▼]   Appraisal Year [ALL ▼]

Create New Plan

1st

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

Records Displayed [10 ▼] | ⛶ 🔄 ⬜ ⚙ ▼ | ▦

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	[Update ▼] [Go]
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	[Update ▼] [Go]
▮▮▮▮▮▮▮▮									

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

Privacy Statement

DoD Performance Management
Appraisal Program

MyBiz+   Help | ▼ | Logout

People in Hierarchy

Return to Main Page

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

Need Help?

Expand All | Collapse All

Focus	Name	Occupational Code	Position Name	Organization	Performance Plan
	◢ Morris, Tammy L				
	FOOTS, Jr.,, FREDDIE LEE	0201.Human Resources Management (0201)	PQ159.HUMAN RESOURCES SPECIALIST.2158886.AF1Y.APPR	AF CIV CAREER TNG AF1YMW1YF60D01	Create
	Harvey, Kimberly A	0201.Human Resources Management (0201)	00X02.HUMAN RESOURCES SPECIALIST.1334476.AF1C.APPR	366 FORCE SUPPORT SQ AF1CMW1CFV6P01	Create
	Tucker, Karen F	0201.Human Resources Management (0201)	9GG75.HUMAN RESOURCES SPECIALIST (EMPL REL/LABOR REL).2113907.AF1C.APPR	366 FORCE SUPPORT SQ AF1CMW1CFV6P01	Create
	Vacant Position	0201.Human Resources Management (0201)	PQ158.HUMAN RESOURCES SPECIALIST.2053155.AF1Y.APPR	AF CIV CAREER TNG AF1YMW1YF60D01	
	Vacant Position	0201.Human Resources Management (0201)	9D1160.HUMAN RESOURCES SPECIALIST.2187448.AF1C.APPR	366 FIGHTER WG AF1CMW1CFCZ901	
	Vacant Position	0201.Human Resources Management (0201)	PQ159.HUMAN RESOURCES SPECIALIST.2158811.AF1Y.APPR	AF CIV CAREER TNG AF1YMW1YF60D01	
	Vacant Position	0201.Human Resources Management (0201)	00X02.HUMAN RESOURCES SPECIALIST.1397120.AF1C.APPR	366 FORCE SUPPORT SQ AF1CMW1CFV6P01	

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DoD Performance Management
Appraisal Program

MyBiz+   Help | ⌄ | Logout

Confirmation

Acknowledge

Supervisory Commitment Statement

I acknowledge my role as a supervisor is vital in fostering a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals; establish open communication; monitor and evaluate employee performance; recognize and reward performance, and appropriately address deficient performance.

DoD Performance Management
Appraisal Program

MyBiz+   Help | ∨ | Logout

Create Performance Plan

Cancel and Return to Main Page

Need Help?

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

Setup Details

* Indicates required field

Build New Plan   Copy from Existing Plan

Appraisal Type   Annual Appraisal - DoD

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

* Appraisal Period Start Date   01-Apr-2018
(dd-mmm-yyyy)

* Appraisal Period End Date   31-Mar-2019
(dd-mmm-yyyy)

Appraisal Effective Date   01-Jun-2019
(dd-mmm-yyyy)

* Rating Official Name   Morris, Tammy L
* Higher Level Reviewer Name   Faircloth, Charles

1st: Ensure dates are correct. Effective date is normally 1 April each year, however, if employee was hired after 1 April, then period start date will be date of hire. End date is normally 31 March and effective date is normally 1 June.

3rd

2nd: Can change rating official and HLR here, if needed.

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DoD Performance Management
Appraisal Program

MyBiz+   Help   Logout

Plan   View/Print Form

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

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

This screen allows you to view and change the details of your employee's performance plan.

Step 1: Plan Details

- Verify the appraisal dates and higher level reviewer name is correct, and, if applicable, make the necessary changes.
- Select Save and Continue button at the bottom right corner to move to Step 2: Mission Goals.

TIP: Choose an Action – located at the top right corner – allows for selection of other actions throughout the performance cycle.

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

Appraisal Type	Annual Appraisal - DoD	**Performance Plan Approval Date**
* **Appraisal Period Start Date**	01-Apr-2018	**Plan Last Modified Date**
	(dd-mmm-yyyy)	**Created By** Morris, Tammy L
* **Appraisal Period End Date**	31-Mar-2019	
	(dd-mmm-yyyy)	
* **Appraisal Effective Date**	01-Jun-2019	
	(dd-mmm-yyyy)	
Rating Official Name	Morris, Tammy L	
Higher Level Reviewer	Faircloth, Charles	

Save and Continue

DCPDS PORTAL   Appraisal Details

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DoD Performance Management
Appraisal Program

MyBiz+   Help   Logout

Plan   View/Print Form

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

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

DoD Core Values: Leadership, Professionalism, and Technical Knowledge through dedication to duty, integrity, ethics, honor, courage, and loyalty.

This screen allows you to enter your employee's Component organizational values, mission statements, or goals which apply to their performance elements and standards.

Step 2: Mission Goals

- Enter your Component's organizational values, mission statement, or goals directly in the text box or copy and paste from another document.
- Select Save and Continue button at the bottom right corner to move to Step 3: Performance Elements and Standards.
- Select Save and Go Back button at the bottom right corner to go back to Step 1: Plan Details.

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

1ˢᵗ: ADD GOALS HERE

2ⁿᵈ

(Limit to 1000 characters)

Spell Check   Counter 0

Save and Go Back   Save and Continue

Privacy Statement

DoD Performance Management
Appraisal Program

MyBiz+   Help | Logout

Plan   View/Print Form

Now you are on this tab.

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

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

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

Step 3: Performance Elements and Standards

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

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

Add Performance Element | ⊠ ⟳ ⬚ ⚙ ▼ ▦ ▼

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

Save and Go Back   Save and Continue

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DoD Performance Management
Appraisal Program

MyBiz+   Help   Logout

Add Performance Element and Standard(s)

* Indicates required field

Save   Save and **A**dd Another Performance Element   **G**o Back to Performance Elements

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

- Enter the Performance Element title and verify the Performance Element Start Date.
- Enter your performance element and standard(s) in the text box or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save and add a new performance element and standard(s).
- Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards.
  ◦ If you select Return to Performance Elements button without saving, a warning message will display.

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

Performance Element Number   1

* Performance Element Title   Labor Negotiations

1ˢᵗ: Add a title for Critical Element 1

* Performance Element Start Date   01-Apr-2018
(dd-mmm-yyyy)

Performance Element Status   Pending

Date Last Modified   17-Jul-2018

* Performance Element Type   Critical ▾

Performance Element and Standard(s)

Enter S.M.A.R.T. goals here. They must be:

Specific
Measurable
Achievable
Relevant
Timely

2ⁿᵈ: Add TASK & STANDARD
in SMART format for Critical Element 1

(Limit to 1500 charaters)

Spell Check   Counter 96

3ʳᵈ: Click here

DoD Performance Management
Appraisal Program

MyBiz+   Help | ∨ | Logout

Add Performance Element and Standard(s)

* Indicates required field

Save | Save and Add Another Performance Element | Go Back to Performance Elements

3rd: Click here to add more Elements & Standards

Click here once all have been entered

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

- Enter the Performance Element title and verify the Performance Element Start Date.
- Enter your performance element and standard(s) in the text box or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save and add a new performance element and standard(s).
- Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards.
  - If you select Return to Performance Elements button without saving, a warning message will display.

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

Performance Element Number   2

* Performance Element Title   Employee Management Relations

1st: Enter title for Critical Element 2

* Performance Element Start Date   01-Apr-2018
(dd-mmm-yyyy)

Performance Element Status   Pending

Date Last Modified   17-Jul-2018

* Performance Element Type   Critical ∨

Performance Element and Standard(s)

Enter S.M.A.R.T. goals here. They must be:

Specific
Measurable
Achievable
Relevant
Timely

2nd: Enter TASK & STANDARD in SMART format for Critical Element 2

(Limit to 1500 charaters)

Spell Check   Counter 96

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DoD Performance Management
Appraisal Program

MyBiz+   Help   ∨ | Logout

⚠ **Warning**   No   **Yes**

Do you want to save the changes you made to Performance Element?

Privacy Statement

DoD Performance Management
Appraisal Program

MyBiz+   Help | ▾ | Logout

Plan   View/Print Form

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

If finished, click the drop down and select "Return to Main Page", then "Go"

-- Choose an Action --   ▾   Go

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

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Step 3: Performance Elements and Standards

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

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

Click here if you want to view or edit them

Here if you want to delete one

Note Pending Status

Add Performance Element

Show All Details | Hide All Details

Details	Number	Title	Status	Element Type	Action	Delete
▶	1 ▾	Staffing	Pending	Critical	Update	🗑
▶	2 ▾	Management and Employee Advisory Services	Pending	Critical	Update	🗑
▶	3 ▾	Special Projects	Pending	Critical	Update	🗑
▶	4 ▾	Manages Assigned Human Resource Programs	Pending	Critical	Update	🗑

Save and Go **B**ack   Save and **C**ontinue

https://bantam.dcpds.cpms.osd.mil/OA_HTML/OA.jsp?page=/civdodhr/oracle/apps/per/civappr/webui/CivapprPlanDetailsPG&OA_SubTabIdx=0&_ti=583917336&retainAM=Y&addBreadCrumb=S&oapc=64&oas=PTmZj2:

Search...

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MyPerformance

MyBiz+   Help | ∨ | Logout

MyPerformance Main Page   Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

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You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'

- Select the 'Go' button

To complete other actions described above:

- Select an option from the Action column

- Select the 'Go' button

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

Plans/Appraisals In Progress

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

Show Me [All Appraisals ∨]   Appraisal Year [ALL ∨]

Create New Plan [--Choose a Plan Type-- ∨] [Go]

Records Displayed [10 ∨] |

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action	
Tucker, Karen F	Morris, Tammy L	Morris, Tammy L	2019	212964	07-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
Tucker, Karen F	Morris, Tammy L	Morris, Tammy L	2019	238494		DoD	Pending	Plan in Progress	Update	Go

Update
Delete
Transfer to Employee
View/Print Form
Change RO and/or HLR
Track Progress

"Transfer to Employee" for edits then "Go"—as many times as needed; should be collaborative effort

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

No action on this page unless you want to retrieve the plan from your employee--see below. Otherwise, proceed to next slide.

"View" means you are not the current owner and therefore cannot make changes until the plan has been returned and it says "Update"

"Retrieve" is an option on the drop down in some circumstances

MyBiz+

Other DCPDS Applications ▾   ★ Favorites ▾   Customer Support ▾   ❓ Help ▾   Logout

Add | Reset | Done 💬

▪▪ Key Services   ✖ ⇄

Manage Key Services 💬

MyPerformance

Request Employment Verification

Civilian Career Report

Update Contact Information

Update Professional Development

SF50 Personnel Actions

Update MySupervisor

Civilian Expeditionary Workforce (CEW)

Civilian Career Brief

Manager Functions

   Performance Management and Appraisal   ⬅

   Apply Action(s) to Multiple Employees

   Manage MyPerformance Trusted Agent Authorization

   View/Print Performance Management Reports

   View Previous Requests

   CIV Fill Request Status

Update MyTeam

   Add Employee

   Remove Employee

   Process Employee Requests

▪▪ Other DCPDS Tools   ✖ ⇄

DCPDS Navigator Homepage

Add HR Region Associations
DCPAS Data Dictionary
MyBiz+ for HR Professionals REG03

Once employee transfers plan back to you,
log in to MyBiz+ and…

MyPerformance

MyBiz+   Help | ⌄ | Logout

MyPerformance Main Page   Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

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

To complete other actions described above:
- Select an option from the Action column
- Select the 'Go' button

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

Plans/Appraisals In Progress

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

Show Me [All Appraisals ⌄]   Appraisal Year [ALL ⌄]   Create New Plan [--Choose a Plan Type-- ⌄] [Go]

Records Displayed [10 ⌄] | ⚙ ▼ |

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action
Tucker, Karen F	Morris, Tammy L	Morris, Tammy L	2019	212964	07-Jun-2018	DoD	Approved	Plan Approved	Update ⌄ [Go]
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update ⌄ [Go]
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update ⌄ [Go]
Tucker, Karen F	Morris, Tammy L	Morris, Tammy L	2019	238494		DoD	Pending	Plan In Progress	Update [Go]

Update
Delete
Transfer to Employee
View/Print Form
Change RO and/or HLR
Track Progress

Once returned from employee and edits, if any, are acceptable, then click "Update" and "Go"

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

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DoD Performance Management
Appraisal Program

MyBiz+   Help   Logou

Plan   View/Print Form   ← **Plan Page**

Step 1: Plan Details   Step 2: Mission Goals   Step 3: Performance Elements and Standards   **Step 4: Approvals and Acknowledgments**   ← **1st: Click on Step 4 on the Plan page**

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F

▶ **Show Employee Details**

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

Step 4: Approvals and Acknowledgments

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

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

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Not Started	Start
▶	Step 2: Higher Level Reviewer - Review (if required)	Not Started	Not Started
▶	Step 3: Rating Official - Document Communication to Employee	Not Started	Start
▶	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

← **2nd: Click "Start" to send for HLR approval**

Save and Go Back

Privacy Stateme

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☑TIP There are two options available to complete this step. If you are both the rating official and higher level reviewer, use Option B to document the approval.

Option A - Transfer to the Higher Level Reviewer

Name	Title
Morris, Tammy L	Rating Official
Faircloth, Charles	Higher Level Reviewer

Option A should be utilized

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

Change Higher Level Reviewer   Faircloth, Charles

Message to Higher Level Reviewer

This screen provides space for you to send a Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the message, select the 'Transfer to Higher Level Reviewer with E-mail Notification' button to send the message.

> Please review this performance plan and take the appropriate action under the Approvals and Acknowledgments tab.

Note the verbiage for the email to the HLR is already included.
You may edit if needed.

Spell Check

Notice: You are about to contact Faircloth, Charles 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 contact information in your e-mail.

Transfer w/email so HLR is notified it's pending action

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

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

Higher Level Reviewer   Faircloth, Charles   Method of Review

Review Date   Other Method   Cancel   Save
(dd-mmm-yyyy)

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

Save and Go Back

https://bantam.dcpds.cpms.osd.mil/OA_HTML/OA.jsp?page=/civdodhr/oracle/apps/per/civappr/webui/CivapprPlanDetailsPG&_ti=583917336&retainAM=N&addBreadCrumb=N&OAMC=R&oapc=84&oas=uowkapY_Hvs(⌄ 🔒 C̴ | Search...

🔖 **S>** Supervisor_Force_Support... ⌄ e-publishing 🔖 EHRI Electronic Official Pe... CMTS 🔖 JPAS ⌄ myPers (2) 🔖 366th Force Support Squa... 🔖 AFPC Secure 4.0 - Main M... AIR FORCE PERSONNEL C... 🔖 AMRDEC SAFE 🔖 ATAAPS Disclaimer 🔖 Business Objects 🔖 CPMS-CARE Home Page (... ⏺ CMTS (2) 🔖 DCPDS

MyPerformance

MyBiz+   Help | ⌄ | Logout

MyPerformance Main Page   Provide Guest Feedback

📋 **Confirmation**

The appraisal has been submitted to the Higher Level Reviewer.
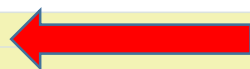
It's confirmed that it was sent to HLR—No further action until returned from HLR

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

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

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.

You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan: To complete other actions described above:

- Select 'Choose a Plan Type'   • Select an option from the Action column
- Select 'Appraisal Plan Type'
- Select the 'Go' button   • Select the 'Go' button

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

Plans/Appraisals In Progress

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

Show Me [All Appraisals ⌄]   Appraisal Year [ALL ⌄]

Create New Plan [--Choose a Plan Type-- ⌄] [Go]

Records Displayed [10 ⌄] | 🔁 ⚙ ⌄

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action	
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update ⌄	Go
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update ⌄	Go
Tucker, Karen F	Faircloth, Charles	Morris, Tammy L	2019	238494		DoD	Pending	Plan Pending HLR Review	View ⌄	Go

Status has updated

No longer owner

Select the link to search for Completed Plans

https://bantam.dcpds.cpms.osd.mil/OA_HTML/OA.jsp?page=/civdodhr/oracle/apps/per/civappr/webui/CivapprPlanDetailsPG&_ti=583917336&retainAM=N&addBreadCrumb=N&OAMC=R&oapc=93&oas=c7nZte2yloL5o

Search...

File   Edit   View   Favorites   Tools   Help

Supervisor_Force_Support...   e-publishing   EHRI Electronic Official Pe...   CMTS   JPAS   myPers (2)   366th Force Support Squa...   AFPC Secure 4.0 - Main M...   AIR FORCE PERSONNEL C...   AMRDEC SAFE   ATAAPS Disclaimer   Business Objects   CPMS-CARE Home Page (...   CMTS (2)   DCPDS

☑ **TIP** There are two options available to complete this step. If you are both the rating official and higher level reviewer, use Option B to document the approval.

Option A - Transfer to the Higher Level Reviewer

Name	Title
Morris, Tammy L	Rating Official
Faircloth, Charles	Higher Level Reviewer

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

Change Higher Level Reviewer   Faircloth, Charles

Message to Higher Level Reviewer

This screen provides space for you to send a Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the message, select the 'Transfer to Higher Level Reviewer with E-mail Notification' button to send the message.

Please review this performance plan and take the appropriate action under the Approvals and Acknowledgments tab.

Spell Check

Notice: You are about to contact Faircloth, Charles 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.

Can bypass HLR w/i the system by using Option B, but ONLY if HLR concurs

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

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

Make selection

Higher Level Reviewer   Faircloth, Charles   Method of Review   Face to Face

Be sure to save if using this method

Review Date   17-Jul-2018   Other Method   Cancel   Save

(dd-mmm-yyyy)

Requires input if "Other" is selected for Method of Review

Can change HLR here, if needed

Then here

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

Save and Go Back

DoD Performance Management
Appraisal Program

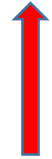MyBiz+   Help   Logout

Confirmation

No   **Yes**

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

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MyBiz+

Other DCPDS Applications ▾   ★ Favorites ▾   Customer Support ▾   ❓ Help ▾   Logout

Add | Reset | Done 🏷️

:: Key Services

Manage Key Services 🏷️

MyPerformance

Request Employment Verification

Civilian Career Report

Update Contact Information

Update Professional Development

SF50 Personnel Actions

Update MySupervisor

Civilian Expeditionary Workforce (CEW)

Civilian Career Brief

Manager Functions

   Performance Management and Appraisal   ⬅️

   Apply Action(s) to Multiple Employees

   Manage MyPerformance Trusted Agent Authorization

   View/Print Performance Management Reports

   View Previous Requests

   CIV Fill Request Status

Update MyTeam

   Add Employee

   Remove Employee

   Process Employee Requests

:: Other DCPDS Tools

DCPDS Navigator Homepage

Add HR Region Associations
DCPAS Data Dictionary
MyBiz+ for HR Professionals REG03

If sent for HLR, upon return, login to MyBiz+ and click here again

MyPerformance

MyBiz+   Help | ∨ | Logout

MyPerformance Main Page   Provide Guest Feedback

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

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

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.

You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:

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

To complete other actions described above:

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

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

Plans/Appraisals In Progress

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

Show Me [All Appraisals ∨]   Appraisal Year [ALL ∨]   Create New Plan [--Choose a Plan Type-- ∨] Go

Records Displayed [10 ∨] | ⧉ ↻ ⬓ ⚙ ▾ ▥

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update [∨] Go
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update [∨] Go
Tucker, Karen F	Faircloth, Charles	Morris, Tammy L	2019	238494		DoD	Pending	Plan Pending HLR Review	View [∨] Go

Upon return, status will update to "Plan Reviewed by HLR"

Upon return should read "Update", then click "Go"

Select the link to search for Completed Plans

DCPDS PORTAL | Appraisal Details

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Plan   View/Print Form

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

System defaults to "Step 1: Plan Details". Click Step 4 Approvals and Acknowledgements tab to see screen below

-- Choose an Action -- [Go]

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

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

Step 4: Approvals and Acknowledgments

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

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

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
◢	Step 3: Rating Official - Document Communication to Employee	Not Started	Start

1st: Click start to send plan to employee for acknowledgement

Communication Date [   ] 📅
(dd-mmm-yyyy)

Communication Method [▼]

Other [   ]

2nd: Input required information

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

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

3rd: Transfer to employee for acknowledgement

[Save and Go Back]

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DoD Performance Management
Appraisal Program

MyBiz+   Help | ⌄ | Logout

Rating Official Notification to Employee - Tucker, Karen F

Cancel   Transfer to Employee without E-mail Notification   Transfer to Employee with E-mail Notification

Message to Employee

This screen provides space for you to send your employee a message regarding his or her Performance Plan. After writing the message, select the 'Transfer to Employee with E-mail Notification' button to send the message. For additional guidance, select **Need Help?**

Please proceed to MyPerformance and select Step 4: Approvals and Acknowledgments under the Plan tab. Once you've acknowledged, a copy of the approved performance plan will be available in the Completed Plans and Appraisals area.

Note that the text is automatically input. <u>May be edited, if needed</u>

Spell Check

Notice: You are about to contact Tucker, Karen F 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.

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MyPerformance

MyBiz+   Help | ∨ | Logout

MyPerformance Main Page | Provide Guest Feedback

📄 **Confirmation**
The appraisal has been submitted to the employee.

Rating Official/Higher Level Reviewer

MyPerformance Main Page

Need Help?

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

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.

You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:
- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button

To complete other actions described above:
- Select an option from the Action column
- Select the 'Go' button

No action needed on this page.

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

Plans/Appraisals In Progress

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

Show Me [All Appraisals ∨]   Appraisal Year [ALL ∨]

Create New Plan [--Choose a Plan Type-- ∨] [Go]

Records Displayed [10 ∨] |

Employee Name △	Current Owner △	Rating Official Name △	Appraisal Year △	Appraisal ID △	Plan Approval Date △	Type △	Plan Status △	Current Status △	Action	
Harvey, Kimberly A	Morris, Tammy L	Morris, Tammy L	2019	147934	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
FOOTS, Jr.,, FREDDIE LEE	Morris, Tammy L	Morris, Tammy L	2019	147932	06-Jun-2018	DoD	Approved	Plan Approved	Update ∨	Go
Tucker, Karen F	Tucker, Karen F	Morris, Tammy L	2019	238494	17-Jul-2018	DoD	Approved	Plan Approved	View ∨	Go

Note current owner

Changed from update

Select the link to search for Completed Plans

Plan   View/Print Form

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

System defaults to "Step 1: Plan Details". Click "Step 4 Approvals and Acknowledgements" tab to see screen below

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

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

Step 4: Approvals and Acknowledgments

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

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

If employee is unavailable or refuses to sign, you have the ability to acknowledge for them, otherwise skip this step and wait for employee to acknowledge.

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
◢	Step 3: Rating Official - Document Communication to Employee	Not Started	Start

1st: Click "Start" to transfer plan to employee for acknowledgement

Communication Date [ ] 📅
(dd-mmm-yyyy)
Communication Method [▼]
Other [ ]

2nd: Input required information

Cancel   Save and Transfer to Employee for Acknowledgment   Save and go to Step 4

3rd: Go to Step 4

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

Save and Go Back

https://bantam.dcpds.cpms.osd.mil/OA_HTML/OA.jsp?page=/civdodhr/oracle/apps/per/civappr/webui/CivapprPlanDetailsPG&_ti=583917336&retainAM=N&addBreadCrumb=N&OAMC=R&oapc=112&oas=PWkJDPujK5v

Search...

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

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

-- Choose an Action -- [Go]

Employee Information

Employee Name   Tucker, Karen F

▶ Show Employee Details

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

Step 4: Approvals and Acknowledgments

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

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

Show All Details | Hide All Details

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

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

Acknowledgment   Other
Other Method   Verbal Acknolwedgement
Date   17-Jul-2018
(dd-mmm-yyyy)

Cancel   Save

Save and Go Back

Privacy Statement

Annotations:

Second Page if **using Step 4** to acknowledge for employee. If not using Step 4, proceed to next slide.

1st

2nd (If other is selected, from drop down, input is required for method.)

3rd

Last

DoD Performance Management
Appraisal Program

MyBiz+   Help | Logout

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

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

-- Choose an Action --   Go

Employee Information

Employee Name   Tucker, Karen F
▶ Show Employee Details

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

Step 4: Approvals and Acknowledgments

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

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

Show All Details | Hide All Details

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

Save and Go Back

Select "Return to Main Page" from drop down menu and then "Go"

If using Step 4, to acknowledge for employee, you'll see this screen. If sent to employee for acknowledgment, you'll have to log back in to MyBiz+ to see that all steps have been completed.

Note that all are complete

Privacy Statement

Once plan is approved and employee has acknowledged, you are finished unless the plan needs to be modified at a later date to add/delete/change duties.