

# DOCUMENTING A PROGRESS REVIEW

## 1. NOTE: The Current Status is Plan Approved

**MyPerformance Main Page**

**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 'Appraisal Plan Type'
- Select the 'Go' button
- 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

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Bwraox, Wzhjkuw G	EHRIS Caaohu, Crdqdd I	EHRIS Caaohu, Crdqdd I	2017	196	25-Apr-2016	DoD	Approved	Plan Approved	Update

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

## 2.

**Confirmation**

**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.

Acknowledge

## 3. Select Progress Review tab.

**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: EHRIS Bwraox, Wzhjkuw G

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

\* Appraisal Period Start Date: 01-Apr-2016

\* Appraisal Period End Date: 31-Mar-2017

\* Appraisal Effective Date: 01-Jun-2017

Performance Plan Approval Date: 25-Apr-2016

Plan Last Modified Date: 18-Aug-2016

Created By: EHRIS Caaohu, Crdqdd I

Rating Official Name: EHRIS Caaohu, Crdqdd I

Higher Level Reviewer: EHRIS Caaohu, Crdqdd I

Save and Continue

## 4. Select Create Progress Review.

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

-- Choose an Action -- Go

**Employee Information**

Employee Name: EHRIS Bwraox, Wzhjkuw G

Need Help?

Progress reviews are conducted to assess employee's performance throughout the performance cycle. At least one progress review is required and is typically conducted at the mid-point of the cycle. From this screen you can create a progress review, update a progress review that has not been approved, and view a completed progress review.

- To create a progress review, select 'Create Progress Review' button.
- To update a progress review, select the 'Update' button under the Action column.
- To view a completed progress review, select 'View History' button under the Action column.

TIP Progress Reviews are a review of an employee's performance which typically occurs midway through the performance cycle. (Note: This does not pertain to the narrative statements or annual appraisal.)

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
No results found.									

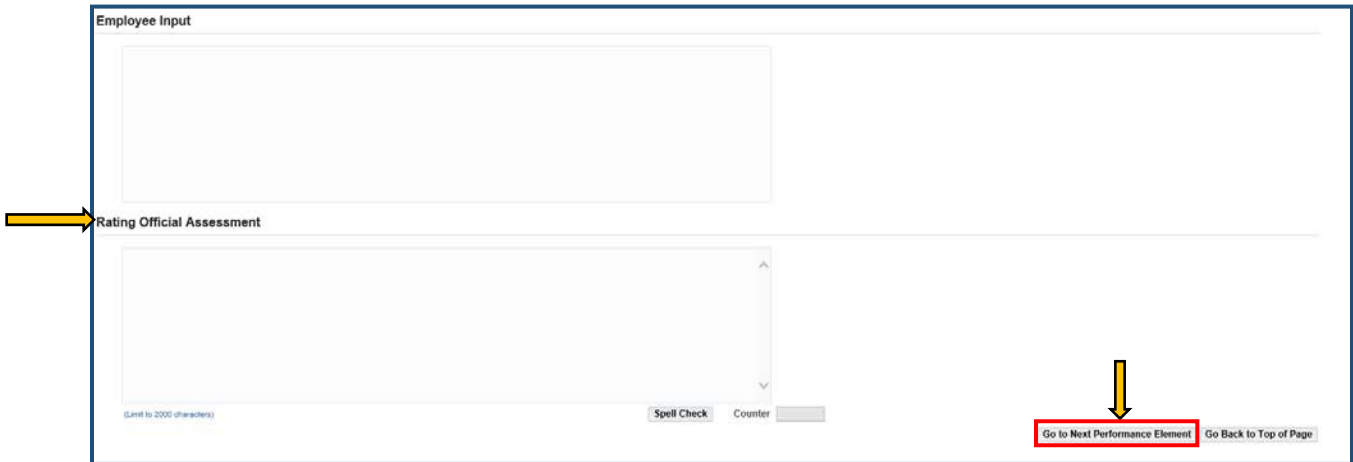
Create Progress Review

5. Select **Update**.



Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
1	Davis, Anya C	09-Oct-2019		Included				<b>Update</b>	

6. 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.

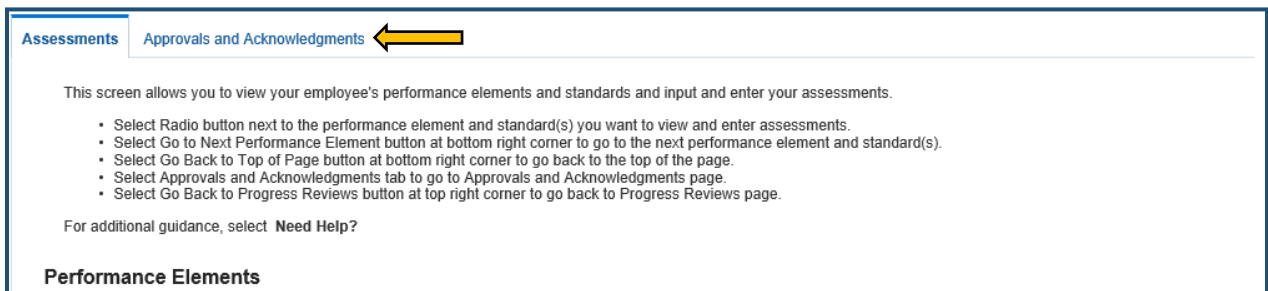


Employee Input

Rating Official Assessment

Go to Next Performance Element

7. 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.



Assessments Approvals and Acknowledgments

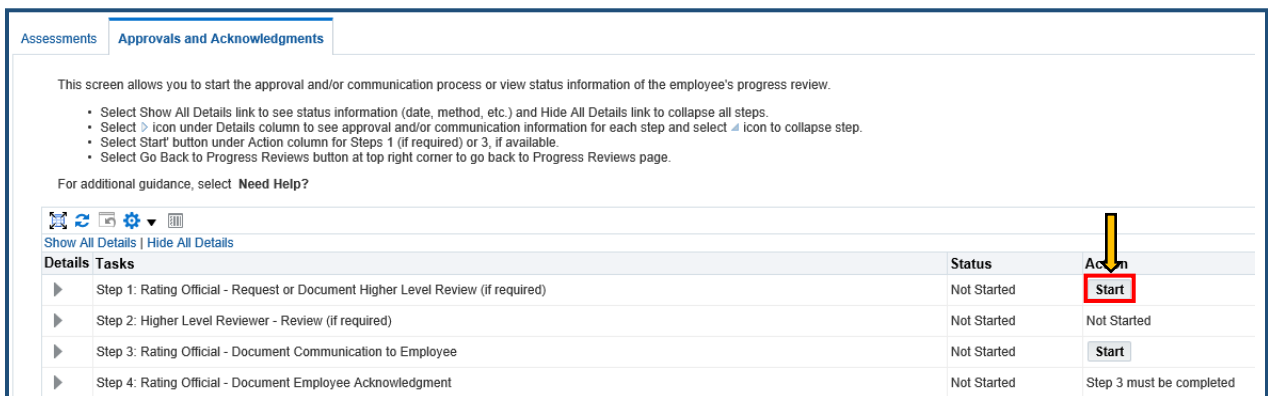
This screen allows you to view your employee's performance elements and standards and input and enter your assessments.

- Select Radio button next to the performance element and standard(s) you want to view and enter assessments.
- Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s).
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select Approvals and Acknowledgments tab to go to Approvals and Acknowledgments page.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

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

Performance Elements

8. The system takes you through the HLR requirement.



Assessments Approvals and Acknowledgments

This screen allows you to start the approval and/or communication process or view status information of the employee's progress review.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select > icon under Details column to see approval and/or communication information for each step and select < icon to collapse step.
- Select Start button under Action column for Steps 1 (if required) or 3, if available.
- Select Go Back to Progress Reviews button at top right corner to go back to Progress Reviews page.

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

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Not Started	<b>Start</b>
▶	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

9. 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 to 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

- 10.

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



16.

Employee Information  
Employee Name: EHRIS Bwaox, Wzhjkow G

Progress Review Information  
Progress Review Initiator: EHRIS Caasohu, Crdqdd I  
Progress Review Status: Pending Empl Acknowledgment  
Progress Review Number: 1

Assessments | Approvals and Acknowledgments

This screen provides information regarding the status of your employee's progress review.

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

Other Method: Acknowledgment  
Date: 01-SEP-2016

Buttons: Cancel, Save

17. Select **Go Back to Progress Reviews**.

Employee Information  
Employee Name: EHRIS Bwaox, Wzhjkow G

Progress Review Information  
Progress Review Initiator: EHRIS Caasohu, Crdqdd I  
Progress Review Status: Completed  
Progress Review Number: 1

Assessments | Approvals and Acknowledgments

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

Buttons: Go Back to Progress Reviews

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

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

Employee Information  
Employee Name: EHRIS Bwaox, Wzhjkow G

Progress reviews are conducted to assess employee's performance throughout the performance cycle. At least one progress review is required and is typically conducted at the mid-point of the cycle. From this screen you can create a progress review, update a progress review that has not been approved, and view a completed progress review.

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action
1	EHRIS Caasohu, Crdqdd I	01-Sep-2016	05-Sep-2016	Completed	17-Aug-2016	Face to Face	01-Sep-2016	View History

Buttons: Create Progress Review, View History, Delete

Dropdown Menu: Choose an Action, Change Rating Official or Higher Level Reviewer, Transfer to Employee, Track Progress, Return to Main Menu

Buttons: Go

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

**MyPerformance Main Page**

**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 'Appraisal Plan Type'
- Select the 'Go' button
- 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]

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Bwraox, Wzhjkuw G	EHRIS Caasohu, Crdggd I	EHRIS Caasohu, Crdggd I	2017	195	25-Apr-2016	DoD	Approved	Progress Review Completed	Update

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

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

**Create/Update Progress Review**

Employee Information: Employee Name: EHRIS Bwraox, Wzhjkuw G

Progress Review Information: Progress Review Initiator: EHRIS Caasohu, Crdggd I | Progress Review Status: Initiated | Progress Review Number: 1

**Assessments** | Approvals and Acknowledgments

This screen provides information regarding the status of your employee's progress review.

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]

Communication Date: 17-Aug-2016 | Communication Method: [Select] | Other: [Text]

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

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

**Rating Official Notification to Employee - EHRIS Bwraox, Wzhjkuw G**

[Cancel] **Transfer to Employee without E-mail Notification** | **Transfer to Employee with E-mail Notification**

**Message to Employee**

Please proceed to the Performance Management and Appraisal and select the Progress Reviews tab and then the Approvals and Acknowledgments tab and complete Step 4. Once you've acknowledged, a copy of the DD Form 2906 will be available in the Completed Plans and Appraisals area.

Enter message to employee

[Spell Check]

Notice: You are about to contact EHRIS Bwraox, Wzhjkuw G 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.

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

**MyPerformance Main Page**

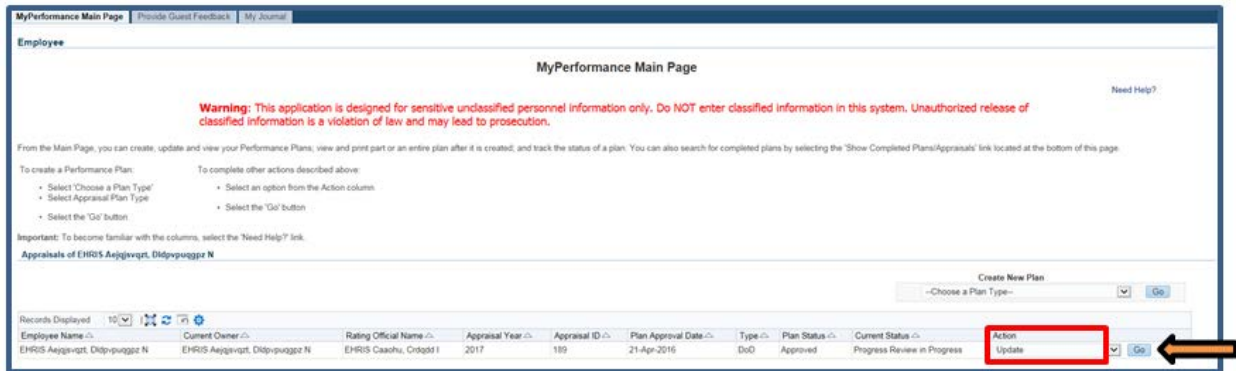
**Confirmation**  
The appraisal has been submitted to the employee.

**Rating Official/Higher Level Reviewer**

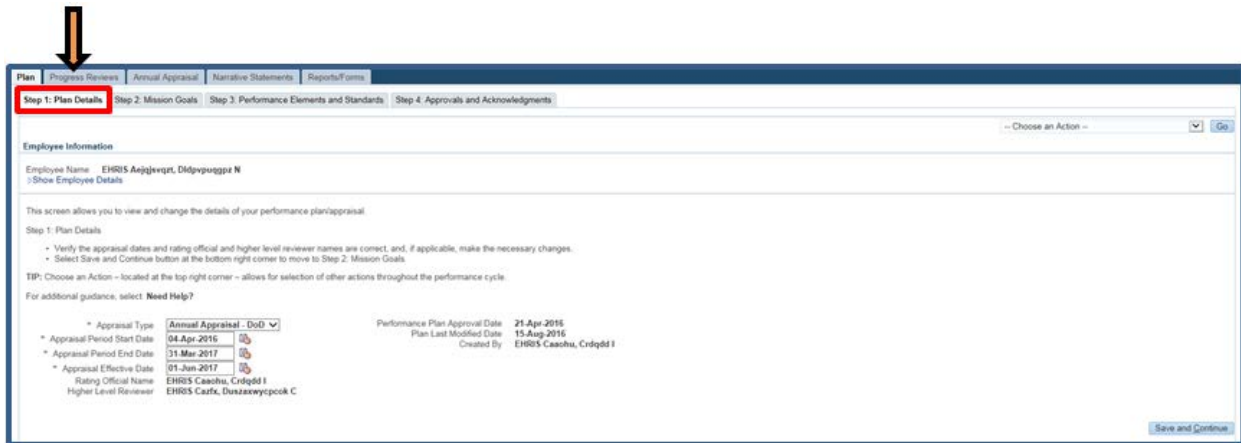
**MyPerformance Main Page**

**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.

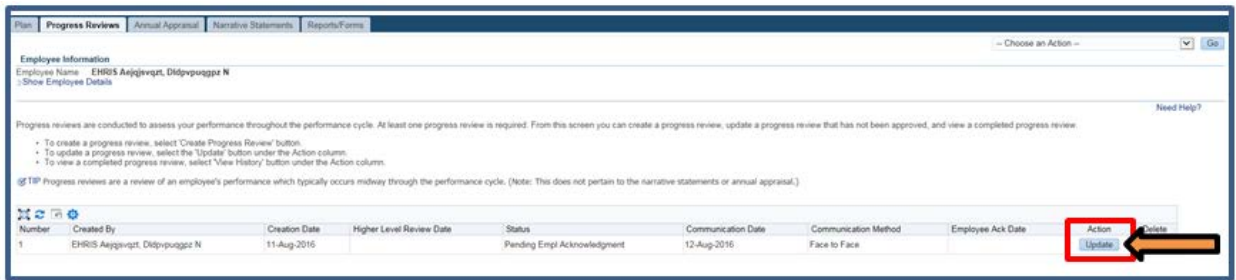
### 23. Employee Acknowledgment.



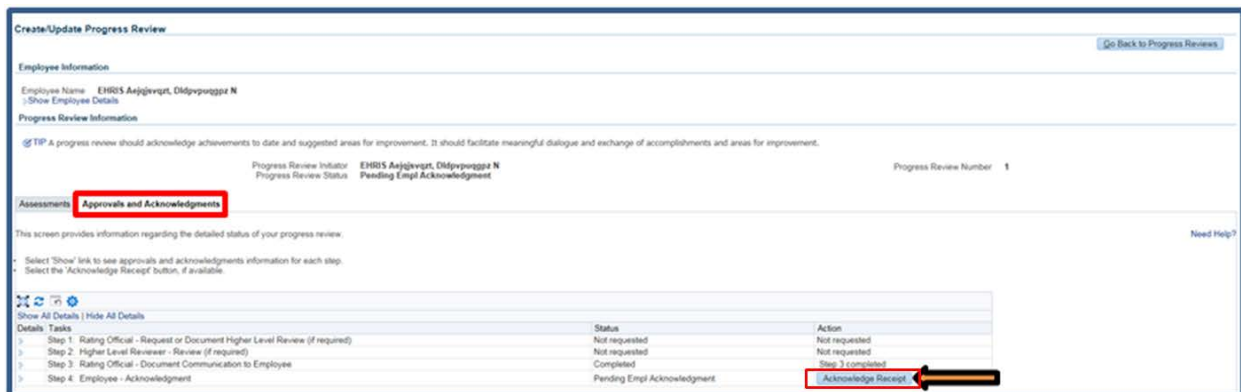
### 24. The Plan Details page is displayed. Select the Progress Review tab.



### 25. Select Update.



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



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

The screenshot shows the 'Create/Update Progress Review' form. The 'Date' field is highlighted with a red box. The 'Save' button is highlighted with an orange arrow.

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

The screenshot shows the 'Create/Update Progress Review' form. The 'Go Back to Progress Reviews' button is highlighted with an orange arrow. The 'Details: Tasks' table is highlighted with a red box.

Details: Tasks	Status	Action
Step 1: Rating Official - Request or Document Higher Level Review (if required)	Not requested	Not requested
Step 2: Higher Level Reviewer - Review (if required)	Not requested	Not requested
Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed
Step 4: Employee - Acknowledgment	Pending Empl Acknowledgment	Acknowledge Receipt

29. 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.

The screenshot shows the 'Progress Reviews' table. The 'View History' button is highlighted with a red box. The 'Choose an Action' dropdown menu is highlighted with a red box, showing 'Return to Main Page' as an option. The 'Go' button is highlighted with an orange arrow.

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
1	EHRIS Aejjivqvt, Dldpvuogzz N	11-Aug-2016		Completed	12-Aug-2016	Face to Face	15-Aug-2016	View History	

30. 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**.

The screenshot shows the 'MyPerformance Main Page'. The 'Action' column in the table is highlighted with a red box, showing a dropdown menu with 'Transfer to Rating Official' selected. The 'Go' button is highlighted with a yellow arrow.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Aejjivqvt, Dldpvuogzz N	EHRIS Aejjivqvt, Dldpvuogzz N	EHRIS Csaohu, Crdqgd I	2017	189	21-Apr-2016	DoD	Approved	Progress Review Completed	Update